



The  
Remodeler's Guide  
to Happy Customers



**Managing**  
the  
**Emotional**  
**Homeowner**

**David Lupberger**

**Remodelers Turnkey Program**

David Lupberger  
1098 Terrace Circle N.  
Boulder, CO 80304  
303-442-3702  
[www.DavidLupberger.com](http://www.DavidLupberger.com)

## **Managing the Emotional Homeowner: The Remodeler's Guide to Happy Customers**

ISBN 0-86718-5198

All rights reserved. No part of this book may be reproduced or utilized in any form or by any means, electronic or mechanical, including photocopying and recording or by any information storage and retrieval system without permission in writing from the publisher.

### **Library of Congress Cataloging-in-Publication Data**

Lupberger, David

Managing the emotional homeowner / David Lupberger ; with Bill Still

p. cm.

ISBN 0-86718-519-8 (pbk. : alk. paper)

1. Construction industry—Customer services—United States. 2. Dwellings—Remodeling—United States. I. Bill Still. II. Title.

HD9715.U52 L86 2000  
690'.8'0688—dc21

00-046073

### **Disclaimer**

This publication is designed to provide accurate and authoritative information in regard to the subject matter covered. It is sold with the understanding that the publisher is not engaged in rendering legal, accounting, or other professional service. If legal advice or other expert assistance is required, the services of a competent professional person should be sought.

—From a Declaration of Principles jointly adopted  
by a Committee of the American Bar Association and  
a Committee of Publishers and Associations.

For further information, please contact:

David Lupberger  
1098 Terrace Circle N.  
Boulder, CO 80304  
303-442-3702  
david@davidlupberger.com

Check us out online at: **[www.DavidLupberger.com](http://www.DavidLupberger.com)**

---

# Contents

<b>Acknowledgements</b> .....	vii
<b>About the Author</b> .....	viii
<b>Introduction</b> .....	ix
What's So Important About Emotional Homeowners? .....	xi
How I Discovered The Secret .....	xii

## CHAPTER

<b>1 The Remodeling Process Through the Homeowner's Eyes</b> .....	1
Jim and Susan .....	3
The Estimates are Received .....	3
When the Pain of the Problem Exceeds .....	4
Number of Jobs Test .....	4
Desensitized .....	4
Empathy .....	5
It's Not the Product—It's the Process .....	5
Free Guidebook .....	5
Top Eight List .....	6
Benefits of <i>How to Find a Remodeler         You Really Want</i> .....	6

The Power of Empathy . . . . . 7  
The Secret: Be A Parental Figure . . . . . 7  
Building Trust . . . . . 8  
The Emotional Roller Coaster . . . . . 8  
Tell Them the Truth about the Process . . . . . 9  
Managing Homeowner Expectations . . . . . 11  
Take Care of Them . . . . . 11  
Parental Transference . . . . . 11

**C H A P T E R**

**2 How to Guide Homeowners Through the  
Remodeling Process . . . . . 13**  
Consistency . . . . . 13  
Honesty . . . . . 14  
Keep Promises . . . . . 15  
Reassurance . . . . . 16  
Clear Communications . . . . . 16  
Simple Documentation . . . . . 16  
Deal With Anger . . . . . 16  
The Zen Approach to Handling  
Homeowner Upsets . . . . . 17  
You Told Them Ahead of Time . . . . . 18  
Be There for Them in a Crisis . . . . . 19  
Projecting Childhood Experiences . . . . . 19  
Above and Beyond . . . . . 19  
Pager Time . . . . . 20

**C H A P T E R**

**3 Job Procedures . . . . . 22**  
How to Avoid Problem Homeowners . . . . . 24  
Fair Compensation . . . . . 24  
The Preconstruction Meeting . . . . . 24  
Ground Rules . . . . . 25  
Job Procedures . . . . . 25  
Dispute Resolution . . . . . 32  
Mediation . . . . . 33

Arbitration .....	34
Summary .....	34

## **A P P E N D I X**

<b>A How to Find the Remodeler You Really Want .....</b>	<b>36</b>
<b>B Complete Specifications List .....</b>	<b>46</b>
<b>C Sample Specifications Index .....</b>	<b>75</b>
<b>D Additional Forms .....</b>	<b>83</b>
<b>Notes .....</b>	<b>92</b>



---

# Acknowledgments

I want to thank my wife, Terrie, who patiently wondered why I spent so many hours in the basement writing, and who let me indulge my whimsy. I want to thank my brother, Kent, who assisted me financially as I followed my dream. And I want to thank my mother and father, who let me dream from a very young age. They have all had a hand in this little book.

## Reviewers

Thanks also to Cheryl Gibson, Von-Jac Development, Inc., Redwood City, CA; Leroy Ostlund, Ostlund & Son Construction, Inc., Traverse City, MI; Bill Owens, Owens Construction, Powell, OH; Shelley Pierce, Dancing River Properties, Inc., Wheat Ridge, CO; N. Claiborne Porter, NCP Construction, Anchorage, AK; Larry Schaffert, Schaffert Construction, Myersville, MD; Ned Seawell, Perfect Service Builders, Inc, San Ramo, CA; Chris Jankowski, Syracuse, NY; Mike Weiss, Weiss and Company, Inc., Carmel, IN; Alan Hanbury, Jr., House of Hanbury Builders, Newington, CT; Tony Thompson, Remodeling Services Unlimited, Columbia, SC; and George Duluth for their thoughtful reviews of this publication.

---

## About the Author

**D**avid Lupberger is president of Master Builder Group, Inc., a “custom renovation and homebuilding” company. He writes a column titled, “Managing It” for *Qualified Remodeler*. He has spoken on this topic at the International Builders’ Show, the Remodelers’ Show, and other industry meetings. He also has written a report titled, *Secrets of a Million Dollar Remodeler*.



---

# Introduction

**E**motional homeowners. Say that to any professional remodeler and most will experience a sinking feeling in the pit of their stomach. If you have been in this business of professional remodeling for any amount of time, you know that emotional homeowners can be a very painful part of your business. They can:

- cost you money
- take a great deal of your time
- cause you a great deal of frustration
- take the fun out of your business

One old joke in medicine goes along these lines: “If it weren’t for the patients, medicine would be the perfect profession.” Sometimes you may think the same is true of the remodeling business. But remodeling and homeowners are inexorably bound together. They are joined together at the hip from the first telephone call all the way to the completion of any project.

## **What’s So Important About Emotional Homeowners?**

We have all had to deal with emotional homeowners. Because we all have to do it, why not learn how to do it right? This book will show you how to manage these emotional homeowners—and not just for your peace of mind. If you learn how to master this skill, you’re going

to have the highest customer satisfaction rating in your area. It will set up a “talk chain” in your community. Remodeling is a word-of-mouth business. You can’t buy referrals and you cannot be successful without referrals. If you get a good buzz going in your community, you will be able to pick the jobs you want to work on because homeowners will be asking for the services you provide. You will have an advantage that most remodelers lack.

**Chapter 1** of this book puts you in the homeowner’s shoes, so that you’ll understand their fears and frustrations as they enter into a remodeling contract. You need to understand the emotional roller coaster that they ride throughout your relationship with them. Unless you understand what’s driving them, you cannot manage them, and the least-understood aspect of this business is that managing emotional homeowners is as important as managing the job itself. You have to start managing them from the first time you speak to them on the telephone. You cannot just jump in halfway through the job with your new strategy. This strategy of managing the homeowner needs to become part of everything you do, from the first call to completion of the project.

**Chapter 2** provides specific techniques on how to deal with homeowner upsets, homeowners in crisis situations, and how to turn a crisis situation into an opportunity to make a lifetime friend.

**Chapter 3** shows you how to identify and avoid the “homeowner from \_\_\_\_\_.” These homeowners are not just difficult or demanding. They are impossible. These are people that can demoralize both you and your remodeling company. When contractors ask me how to work with the homeowner from \_\_\_\_\_, my answer is the best way to deal with them is not to work with them in the first place. This chapter provides specific ideas on how to identify and avoid these difficult and expensive clients.

## How I Discovered the Secret

How did I learn about managing emotional homeowners? About 4 or 5 years ago, I received a call from a psychiatrist who asked to meet with me. He had just gone through a major renovation, and he wanted me to tell a story about what the process was like for him and how he thought remodelers could make the remodeling process easier on everyone concerned. I met him for lunch, and he actually brought his partner who was a psychologist in his practice. Both had recently gone through major renovations on their homes. They had definite ideas about how this process could work better, and for the next 2 hours both unloaded on me in emotional terms.

“If remodelers just understood what was going on—if you just knew how to respond to this emotional roller coaster that your clients are on during this process- it could have made a world of difference. You know how to build, but you don’t know how to manage people.”

To my surprise, they had prepared a list of the most important facts remodelers need to understand before they ever meet with clients. Their points included:

- When you enter into a relationship with homeowners, it is much like a marriage. Depending on the size of the project, it can be a 6 to 12 month “marriage,” and it should be approached that way.
- The difference in this marriage relationship is that you, the remodeler, are usually “marrying” a married couple. But that’s not where the complexity ends. During times of difficulty, the remodeler frequently becomes the mediator between the husband and wife.
- Many times the relationship becomes so complex that only a couple’s personal physician or therapist gets to know them as well.
- Dealing with clients is easy. Become a “parent.” Use the parenting skills most of you have already developed. The following chapters will expand on this idea later, but for now what your clients really want is a parent figure to take care of them as you and your workers rip into their homes. As a parent figure, you provide reliability and security, but you also establish boundaries.
- Another important aspect of a successful remodeler-client relationship is clear communications. Clear communication is crucial. This book will show you how to systematize your communications so nothing is left to chance or interpretation.
- Lastly, part of taking on the parental role is to let your clients know that quitting is not an option. You will be there for them every day, every hour, all the way through the process. When you reinforce this concept early and often, it pays big dividends in the end.

So stick with me. *Managing the Emotional Homeowner* is an easy read. Spend one evening with this little book and you won’t regret it. It could change your contracting life forever, boost your bottom line, and make remodeling life a little easier and much more enjoyable.



# The Remodeling Process Through The Homeowner's Eyes

**A**fter many years in the remodeling business, I finally figured out the key ingredient to guarantee success. Believe it or not, the quality of your work is not what homeowners are most concerned with. Quality is highly important, don't get me wrong. But some other important factors are at work here. Let me show you what I mean. Just answer these quick questions:

- How many of us know that we've done a great job for a homeowner, but the homeowner never appreciated it?
- How many of us have had clients whom we just couldn't please no matter what?
- How many of us have had a homeowner lose it and start yelling at us?
- How many of us have felt that we had lost a client's trust and were unable to regain it?
- How many of us have lost money on a job?

The bottom line is that for the homeowner, the major issue it is not entirely about the quality of your work. Another mysterious factor plagues the remodeler-homeowner relationship. What is it? Fear. Homeowners are scared. They are filled with fear. Let me quote from an article entitled "The Fear Factor" from *Remodeling* magazine in July 1993:

You've heard a thousand reasons why prospective clients don't go ahead with their jobs, but there is one they won't tell you—fear. Consumers are scared of remodeling. They're scared of remodelers. They're scared of you.<sup>1</sup>

Two things are present for all homeowners who undertake a remodeling project: number one, their homes are usually their biggest investment; number two, their homes reflect who they are. Most people have more money in their homes than anything else, so they have a lot at stake. Because their homes are a reflection of who they are, they also have a huge emotional investment in addition to this financial investment. With this large emotional and financial investment, homeowners are afraid to put this investment at risk, and they are afraid for the following 4 reasons:

- **Crooks.** Homeowners are afraid of being ripped off by unscrupulous contractors, and they hear these stories all the time. They hear them on television, they're in the newspaper, and they're on radio—some unscrupulous contractor who ripped off some innocent homeowner.
- **Money.** Homeowners do not understand the real cost of remodeling, and they are terrified of hidden costs that will come up when they least expect them.
- **Disappointment.** After lots of money and time have been spent designing their project, homeowners are terrified that upon walking into the project after it has been started, they are going to look around the new room and say, "This is not what I want." Nonprofessionals have a difficult time conceptualizing what the space is going to look like based on a set of plans that are lying in front of them.
- **Disruption.** Remodeling is a highly disruptive process. You can be without a kitchen or a bathroom for weeks or longer. This situation disrupts every routine in every household that goes through the remodeling process.

All of these fears listed above lead to a feeling of a loss of control. They feel as if they lose control of their home. They frequently feel as if they lose control of their finances. They generally feel out of control and in a vulnerable condition. Homeowners with these fears will delay their decision to remodel as long as possible.

Let me quote again from the same article titled, "The Fear Factor."

Another very real human tendency reinforces their fear. People can get used to practically anything. We all develop blind spots about the familiar. In other words, it takes a big problem with the client's home to penetrate that blind spot and start the homeowner thinking about fixing the problem, and the mental wall between the problem and the solution will be even higher when the client is afraid of the process of making things better.<sup>2</sup>

## Jim and Susan

Jim and Susan, a young couple from Arlington, Virginia, put their first house up for sale while they bought and moved into a new home. They hired an architect and designed a custom renovation for this new home.

Because of the sluggish real estate market, however, they were unable to sell their former home. As they waited for it to sell, Jim and Susan worked with their architect to refine their design ideas. After nearly a year of nail biting, their former house finally sold, and they decided to move forward on their renovation.

Stop just a minute and put yourself in their shoes. Imagine the stress and excitement this experience holds for them. Their faces were beginning to turn blue as they held their financial breath, waiting for their old house to sell. At the same time, they excitedly developed their ideas for the future makeover of their new home.

Once the waiting was over, they were ready to move. Their architect provided a set of blueprints, and they approached three builders with the goal of obtaining three separate estimates based on those blueprints.

Jim and Susan immediately disqualified one of the builders. They simply did not like him. The other two took the plans and promised to contact them with preliminary bids.

## The Estimates are Received . . .

Bid 1 estimated the total cost of their project would be between \$250,000 and \$275,000. What a shock. Jim and Susan had previously determined that their budget could go no higher than \$175,000.

One glaring fact immediately raised their suspicions about this estimate. The entire document filled only a single sheet of paper. Jim was outraged. How can you do this on one page? You can't! There's no detail here. It's either shoddy guess work or this guy's a scam artist, pedaling padded numbers. Jim just waved it off as a blatant rip-off attempt. Their renovation project was large, but it wasn't large enough to cost that much money.

Jim wanted to see some serious work. For the size of this project, he felt a remodeler's presentation should be specific, detailed, and reflect the same attention and care he and Susan and their architect had given it.

But what a difference a day makes. Soon, bid 2 arrived loaded with details. This remodeler, to Jim's eye, an obvious pro, delivered a large, well-organized proposal neatly specifying down to the last nail and board the exact materials and techniques he would use. This document could be trusted, Jim and Susan thought. They confidently anticipated the document's last page where they would find a truer and more specific cost estimate.

Imagine the emotional roller coaster ride they were on when they turned the page and found bid 2 had come in at \$225,000 to \$235,000.

Fortunately, the story ends happily because remodeler 2 stepped in, asked direct questions about their budget, and immediately began working with them to refine their dream addition into something they could afford.

## **When The Pain of the Problem Exceeds . . .**

Having a major renovation is a lot like elective surgery. Elective surgery is not required, but is the kind of surgery where your doctor has said, “If you get this done, there will be less pain, you’ll feel better, and you’ll have a better life.”

Now, when you speak with people who have had elective surgery—it could be on a bad knee, it could be on a bad back, or a shoulder, or an elbow—most people you’ll speak to will have postponed this decision for months or sometimes even for years. They finally decide to have the surgery when the pain of the problem is greater than the fear of fixing the problem, and one word describes the process that they went through, and that one word is surrender.

Most homeowners don’t look forward to remodeling. It is something that they surrender or submit themselves to.

## **Number of Jobs Test**

With that in mind, flip perspectives here and look at it from the remodeler’s point of view. When you, as a professional remodeler, go through the clients’ door, do you really understand how much fear homeowners have concerning this process? Let’s take a test. Answer the following questions—

1. How many jobs have you done in the last 10 years? Most remodelers have done at least 100 to 200 jobs in the last 10 years.
2. How many jobs do you do in the course of a year? Many remodelers will do 30 to 40 projects in a year.
3. How many jobs do you do at one time? And again, most remodelers do anywhere from two to four jobs, if not more, at one time.

## **Desensitized**

The point is that when you’ve worked 200 jobs in the last 10 years and up to 40 jobs a year or 3 to 4 at any given time, you become desensitized to what people are going through as they are about to lose control of their homes. At seminars, I frequently ask remodelers who in the audience has remodeled his or her own home? Then I asked them how long they put it off. You’d be surprised at the answers. Professional remodelers are no different from the



average homeowners they deal with. They postpone the process for as long as possible. When I ask them what the process was like for them, they describe the same fears as many homeowners. It is a highly invasive and disruptive process, and one that is not always under control because of all of the different people involved in the remodeling process.

## **Empathy**

So what's the solution? Empathy. When you let homeowners know that you are aware of their fears, that you empathize with them. You can form a bond like none other in the remodeling business. When you as a professional remodeler acknowledge that homeowners have real fears about this process, you will become more successful than you ever imagined. Why? Because remodeling is a relationship sale. You are not only selling a service, you are selling them a relationship. We're not just selling a finished product; you're also selling a process. You must manage that process as well as manage the project. Let me make idea this a little clearer.

## **It's Not the Product—It's the Process**

If you ask 10 different people about complaints they had about a remodeling process, you'll probably discover in about 90 percent of the cases that the complaints were not about the product or what they were left with. In almost 90 percent of the complaints that I've dealt with, the homeowner's complaints were about the process. They were about expectations that were not met, timetables that were not kept. They were about something that did not happen, information that was not shared, and the homeowner was left in a process he or she did not understand and did not know what would happen next.

Knowing how to build is not enough. We are also managing homeowner expectations. We can deliver the project but lose homeowner trust by not managing this sometimes difficult emotional process. Homeowners need to understand the process and be part of it. Your success in remodeling will result from your ability to have empathy with your clients and to convey that you truly understand what they are going through. You need to understand that homeowners are quite vulnerable during this process. They do not know whom to trust, where to begin, or even what to do. Many homeowners are overwhelmed just by the decision of who to work with.

## **Free Guidebook**

To help them through this sometimes overwhelming process, you are going to offer them a free guidebook. The name of the guidebook is *How To Find The*

*Remodeler You Really Want.* A copy of this booklet is included in Appendix A of this book for your use, copyright free. I provide a customized booklet to all my prospective clients when I go out on the first appointment. This booklet is one of the first things I want them to see to help them understand that in a remodeling project, the process is as important, if not more important, than the price.

## Top Eight List

From interviews with homeowners who have weathered a remodeling job successfully, I've compiled the following list of the 8 attributes they most appreciated about their remodeler:

- Good listening skills
- Good communication skills
- A positive, nonadversarial attitude
- The demonstration of understanding and patience
- A relationship-oriented approach
- Honesty and integrity
- Personal responsibility
- Fair price

Price was only the eighth most important attribute these remodeling veterans considered important in their remodeler, and even then, the word used was fair price, not *lowest* price. What homeowners want is a partner, someone they can trust and believe they can work with in a flexible and cooperative manner. But this model requires that you start your potential clients off on the right foot from the beginning. Otherwise, most clients go into this process focused on price. Who's going to give me the most square feet for the lowest price? What they never realize going into this on their own, and you've got to help them realize it, is that if they get stuck in this old model, they are almost always going to be disappointed by the process and usually the product.

## Benefits of *How to Find a Remodeler You Really Want*

Using this guide will accomplish two things for you:

1. It will set a new standard of professionalism in the minds of your potential clients. *How To Find The Remodeler You Really Want* will help your clients organize their thoughts and give them a plan of action, a blueprint they can follow that will make them feel more in control, and that's definitely going to help you. After all, you become the instant authority in their minds whether they realize it or not.

2. By using and following the information in this book, you already have the right answers to each one of these questions. It's like someone giving you a test when you wrote the questions for the test. You can't fail. Your competition may not have heard many of these questions before and won't have good answers ready. Shady operators will have bad answers or no answers. And after all, that really is the point. You are legit. You take time to build your business. You've probably been around a while. You want to build up a list of good referrals. Isn't that what these questions are supposed to sort out?

The actual text for this guidebook is included in Appendix A. It is also on the diskette that comes with this book. Use the diskette to create a custom guidebook for each prospective client that you meet. Successful remodelers start early to sell potential clients on benefits other than price. This guidebook will help your targeted clientele make the right choices. By offering them this guide, you can help them pick the remodeler who will get them what they really need.

## **The Power of Empathy**

Empathy is a complicated word. How do you achieve it? You have only one sure-fire way to empathize with your clients in just the right way.

What's your biggest relief when you are overwhelmed by making an important decision about something that you know only a little about? Isn't it having someone step in and say, "Don't worry. I know how to do that. Let me take care of it." Isn't this idea why we hire lawyers, doctors, and other professionals? Because we want them to handle the issue or problem.

What does a good family doctor do? He or she asks questions and has a personal interest in you and your family's health. The best doctors take their time to not only check on your physical health, but your emotional health as well. They are there when you need them.

These situations are no different from the homeowners you work with. They hire you because they want to be taken care of. During these stressful times, what they really want is someone they trust to step in and say, "Don't worry. I'm going to take care of it, it's going to be all right." They desperately want someone they can trust.

## **The Secret: Be A Parental Figure**

You must build trust right from the beginning. Here is one of the most important concepts a remodeler can employ in building trust. Your clients want you to assume a parental role. The age differences between you and your potential clients don't matter. Although your clients are not children, in most cases they

haven't been through this process before. When you are explaining something, explain it in simple terms, then repeat it. Start out with an overview or synopsis, explain every point in detail, and then be sure to summarize it all.

## **Building Trust**

From the start, you want to build trust. You do that by consciously and deliberately making little promises and keeping them. Set a routine and stick to it. And understand that they may have temper tantrums. Don't take them personally. Don't get drawn into the upset. Remember, you are the parental figure, but you can't spank them.

Now, to understand what is going on again, step into the homeowners' shoes so that you can see the process from their perspective.

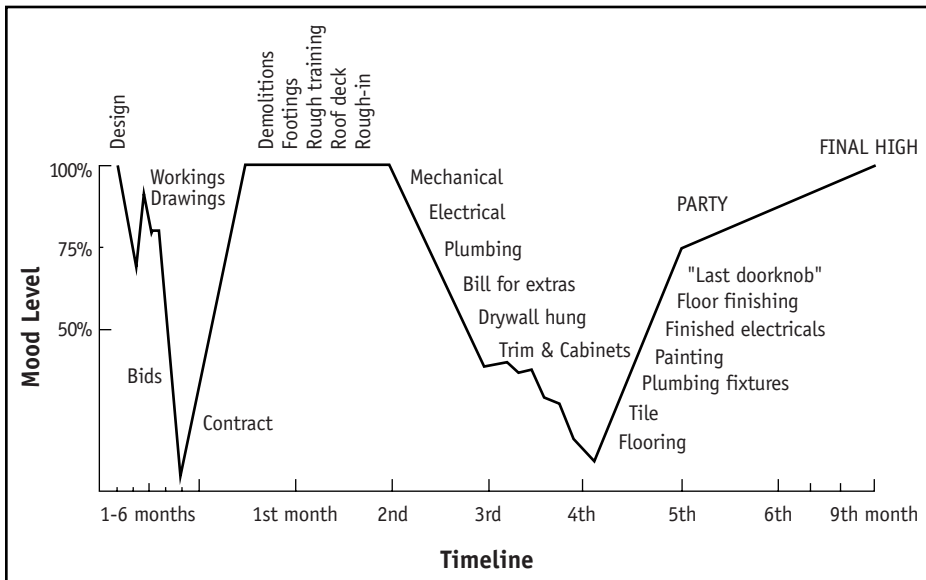
## **The Emotional Roller Coaster**

Remodeling construction is about making dreams happen. Frequently, homeowners have nurtured these dreams for years and years. At that first meeting with prospective customers, how many times have you seen a thick scrapbook or file folder come out overflowing with pictures of concepts that they want to incorporate into their home? These are their dreams, and your job is to make those dreams happen.

On the other side of the table, you are coming from a slightly different place. Remodelers spend time on project management: estimating the job; lining up the trade contractors, arranging materials; and scheduling the work. You focus on task management. In most cases, you may not be focusing on the homeowner's dreams. You simply may forget about managing one of the most important parts of the job, managing their dreams.

Nobody can manage somebody that they do not understand. First of all, you need to realize that homeowners are on an emotional roller coaster. They plunge from excited expectancy (when they first start sketching out rough plans), to depression when they get the first estimates. When construction begins, they're up. When they get the first bill for change orders, they're down. Up and down, up and down they go on their emotional roller coaster. If you understand this situation, you'll stand among your competitors because most of us are good remodelers, but few of us know anything about dealing with emotional states of mind. Some remodelers don't even realize that this emotional roller coaster exists.

As you can see in Figure 1-1, from the time homeowners start working on the plans, they get excited. But when they get their first estimates, their emotions plummet because the estimates are always higher than they thought they were going to be. When the demolition work starts, they're back up, and as the

**FIGURE 1.1 The Homeowner's Emotional Roller Coaster**

work proceeds the emotional curve slowly goes down over time. In my experience, usually dry wall is the low point, because dust is everywhere. It's messy and it's dirty. Slowly, towards the end of the job, the emotions start coming back, but even on a perfectly-run job, once it's over, they're going to say, "We love you. You've done a great job, but please leave. We want you to leave."

## Tell Them the Truth about the Process

When you work with people, one of the most important things you can do is to tell them the truth up front. Tell them how a remodeling job is going to be. Do not sugarcoat it. Tell them about the emotional roller coaster. Tell them—

- The job is going to cost more money than they expected.
- They are not going to like the process much at times.
- They are going to lose their tempers at times.

When I begin working with a client, one of the first concepts I propose at my initial appointment is wouldn't moving be easier? In other words, ask them if selling their home and moving would be easier. In most cases homeowners have already thought about this possibility. They've considered the cost of moving, and thought about schools and neighborhoods, and they have already come to the conclusion that they would like to stay where they are. But you need to get that issue out in the open.

The next question I ask is have they ever done a large remodeling project before? If the answer is no, I ask them, do they know someone who has done a large remodeling project? This question will usually lead to a fairly spirited conversation about what the friend went through during the renovation project itself. This experience is what I want to review with them. I want them to repeat the stories they have heard. I want to talk with them about how difficult and challenging a remodeling project can be. They will have strangers in their house every day, doing a variety of tasks, making a lot of noise. If it's summer they're going to get hot, and if it's winter, they're going to feel cold. Building materials will be coming in, and a lot of trash coming out. Even with daily clean up, their house will still be dirty. They may be without a kitchen or bath for weeks or longer. Remodeling will interrupt virtually every routine they follow. I want them to understand the challenges every remodeler faces in dealing with 8 or 10 independent trade contractors and the inevitable delays that are part of the remodeling process. I spend whatever time is necessary helping homeowners understand that in any good-sized remodeling project, the remodeler is managing a process as well as a project, and an emotional component comes with the remodeling experience. I talk about the emotional roller coaster that homeowners ride throughout the remodeling process. This fact is something you want to bring to the table from the first meeting, that this process is a demanding one. This point gives you the opportunity to start emphasizing that you, as a professional remodeler, will be there to guide them through it.

I also tell them that during this process, because of the emotional demands, a point may come, or more than one point, where they just lose it in a given morning, afternoon, or evening, they may feel like they've just had it, and they just do not want to do it anymore. They are going to dump on somebody, and guess who that's going to be? You, the remodeler, are always going to be the handiest target.

I let them know that these emotional ups and downs are likely to happen. At these times they are going to question what they're doing and why they did it. Again, as their remodeling "parent," I'm going to emphasize that this situation is okay. It happens. It's part of the process, and I'm going to be there to guide them through the situation.

One of the last points I like to make to clients is that not until 2 or 3 months after I've gone are they going to start to feel really good about the money they've spent and the hassle they went through. Only then, on a cool evening when they're sitting in their new room with a glass of wine in hand, with a nice breeze gently moving the drapes, the sun setting, they're going to look at their backyard and only then say, "Gosh, I'm glad we did this." They may need 2 or 3 months for the bad memories to fade, the fears, the dust, the money, and the strangers tromping through their house. The point, again, is let them know this up front.

## Managing Homeowner Expectations

Homeowners all have expectations when their job begins. The problems in remodeling begin when remodelers don't meet those expectations, because remodelers are in the business of managing homeowner expectations. Understanding this simple fact is the basis for being successful in your remodeling business. When you listen to most homeowner complaints, you'll notice that most are not about the actual construction. In almost 90-percent of the complaints I've heard, the complaints were centered not on what happened in the house, but on what didn't happen, of promises that weren't kept, on expectations that weren't met. Homeowners did not get what they thought they were going to get, and it upset them. What every successful remodeler learns is that we are the ones that set these expectations.

Remodeling someone's home is a challenging process. Homeowners need to understand not only the financial side of the process, but they need to fully comprehend the emotional demands that will be placed on them throughout their project. As an experienced remodeler I know how hard this can be. One of my jobs with homeowners is to prepare them physically and emotionally. I will guide them through the process, but the best way I know to get them prepared is to be honest about the process itself. The outcome? When their project actually begins, they experience few, if any surprises. They are ready to roll with the punches. They understand that the schedule will have some fluidity to it. And when the process itself is actually easier than I described, I come out of the job with clients for life because I have exceeded their expectations.

## Take Care of Them

What's the major responsibility of a parent? Take care of them. The most important phrase to start incorporating in everything you do and say to your clients it's to tell them, "I am going to take care of you."

For you to be successful in remodeling, you need to include this concept in everything you do, beginning with your marketing material and continuing all the way through your project to completion. Again, the parental focus permeates everything you do. You must let them know that you understand their feelings, you understand what they're going through, and that you're going to be there to take care of them. What does this mean? It means you are going to guide them through the process.

## Parental Transference

At the beginning of any good-sized job a subtle transfer of authority takes place. Whether you realize it or not, if you are controlling the process, like any good

remodeler does, you take on the role of a parent to your clients. This phenomenon as known as parental transference. That's a real, live technical term, not one I made up. The psychiatrist I spoke to confirmed this concept, that a good remodeler takes on a parental role when a project begins.

If you just do a few steps to enhance this effect, you can make a big improvement in your relationship. Why? Because your clients are subconsciously geared up for parental transference before you even walk through the door. In their eyes, you, the remodeler, have a lot of power. You are the person who will make their dreams happen, and these are dreams that they have nurtured for years. You are literally larger than life because of the unbelievable access they're about to give you to the guts of their everyday lives, and you want to be ready to accept this role with open arms.

Therefore, your paramount thought throughout their remodeling job is that you're going to be there to take care of them—to guide them through the process. Once they see that you're really geared up to insure that they are taken care of, they will transfer this parenting role to you gladly and let you run the project.

You can enhance the effectiveness of your role so that everyone is happier throughout your job. For example, if you have small children, what's important? That you're always going to take care of them. That's why being late to pick up a child from school can have such negative consequences. Being late may mean little to you as a parent, but this situation can be devastating to a child. They depend on you and have no one else to depend on. They hope and trust that you're always going to be there when they need you. Homeowners want the same thing. They hope and trust that you will be there when they need you.



# How to Guide Homeowners Through the Remodeling Process

**H**omeowners desperately want to trust you. This chapter reviews the skills that you can use to guide homeowners through the remodeling process.

The first is trust. If you understand the elements of trust and practice them honestly, you will never have any serious problems.

- consistency
- honesty
- promise keeping
- reassurance

## Consistency

As with children, you need to set consistent boundaries with remodeling clients, and you need to stick to them. For example, If small children or infants stay up too late, they're grumpy. If infants miss their afternoon nap or meal, they're emotional. They cry, they're moody, they're irritable. So what's the answer? The answer is a consistent routine. As a parent, you want to create a routine that your children get used to and can depend on. Dinner at 6, bedtime at 9. Consistent routines make kids happier and healthier.

Do your kids set these routines? No. You, the parent, set them. Parents provide the boundaries. Children want that; their bodies need it. Everyone needs it.

The homeowners you work with crave the same consistency. Their worst nightmare is a pack of unorganized workers dragging in at all hours on Monday morning, spilling coffee all over. You’ve got to make consistency important to your workers and trade contractors. You’ve got to let them know that consistency is the cornerstone of how you handle your clients.

At initial meetings, be specific about your job procedures. Do you have a remodeling schedule? Give them that schedule. See the examples in Figures 2-1 and 2-2.

Show the homeowners that they can depend on your consistency. If you agree that no workers will appear until after 8 a.m., stick to that. If you agree that the construction area will be cleaned up every day, see that it’s done, or do it yourself to make sure. On the other side, you also want to be specific about their obligations and what you expect. Don’t fluctuate here either. Hold them to their promises as tightly as you can. Just like your children, they will respect you more in the end for this kind of consistency.

## Honesty

Advice is easy to give, but being honest rarely has much of a short-time down side and usually has a long-term up side. When a problem arises, face it quickly and squarely. Most of your clients will always respect an honest admission of guilt.

- Acknowledge your mistakes. If you have a custom kitchen order and you discover that you left a cabinet out, say, “I made a mistake.” If I mess up the order, the sooner I let the homeowner know, the better, because that missing cabinet is going to affect the time of completion. I

**FIGURE 2.1 Preliminary Schedule Weeks 1-6**

Week 1	Week 2	Week 3	Week 4	Week 5	Week 6
The initial meeting	Sign-off on the preliminary plans	The first draft of preliminary plans	The first revision of preliminary plans	The second revision of preliminary plans	The second revision of preliminary plans followed by a site visit by trade contractors

Using this example, create a preliminary design schedule with your clients. Discuss how much time is needed for the different parts of the process. If they have a completion date in mind, show them what it will take to meet it.

**FIGURE 2.2 Preliminary Schedule Weeks 7-12**

Week 7	Week 8	Week 9	Week 10	Week 11	Week 12
	<p>The final cost estimate with completed plan including:</p> <ul style="list-style-type: none"> <li>• complete specifications</li> <li>• identification of a start date</li> </ul>		Execution of the contract	The second revision of preliminary plans	Start of construction

Use the spreadsheet format shown. It makes it very easy for homeowners to understand.

want the homeowner to know as soon as I make the mistake. Some remodelers believe that they can work around these situations because they don't want to look bad. The idea here is to forget about looking bad. It's more important to look honest. Your integrity is worth more than trying to appear that you are always right, and this kind of integrity is what your homeowners are looking for.

- Tell homeowners what is going to happen each week. For example, if dust is going to be a problem during the demolition and during the dry-wall sanding stage, give them the bad news up front. A lot of what you are doing here is managing their expectations. In that first meeting when you let them know how hard the remodeling process can be, you are guiding them through the process by managing their expectations.

## Keep Promises

This aspect of trust building, keeping promises, is so easy to accomplish when you start out in little ways. Be on time for the first appointment, no matter what. Call to let the homeowners know you'll be on time. This timeliness represents promise number one. Make little promises that you know you can keep from there on. "Yes, I think I can have that estimate back to you in 10 days." "Yes, I can have that sample to you by Thursday." Keep these initial promises, and you will really build trust that will reap benefits for months to come.

## Reassurance

In my experience you can't tell a homeowner often enough that the job is going to come out all right. It's music to their ears; it's what they want to hear. Say it over and over. "It's gonna be okay. I'm gonna be here to take care of you." Literally in the same fashion, the homeowner desperately wants to believe that all through this building process you are not going to quit on them, that you're going to work with them and to help them. That you're going to manage the job from the beginning all the way through to the end. Just as with children, they want to know that you're going to be there for them. They need to hear that you are not going to quit. You're not going to leave them hanging. You're not going to go broke.

## Clear Communications

As I mentioned before, if you listen to typical remodeling complaints, you'll notice that they are not usually about the actual construction itself. Complaints are usually about something that didn't happen. They are about expectations that weren't met. In other words, communications weren't clear.

Most remodelers know how to remodel and build. We're not so good at communicating, scheduling, and documenting the things said and done. I've found that one of the greatest fear quenchers is detailed paperwork that I've put in the homeowner's hands.

## Simple Documentation

Let me give you a \$1,000 tip. At the end of each meeting with the homeowners, write a simple summary of what was said. You can buy a carbonless memo pad from the stationery or office supply store. During the course of each meeting make notes on that carbonless memo pad. At the conclusion of the meeting, simply hand them a copy of that memo.

You should include in addition to your notes to jog your memory, a simple summary of what is supposed to happen by the next meeting. This memo form holds you accountable, and it also holds them accountable. Homeowners will thank you for these notes. These notes will keep them in the loop, and that's really what homeowners are looking for. These notes will also document progress on an ongoing basis and document what was said. If conflicts arise in the future, you can always refer back to the meeting notes.

## Deal With Anger

Even with a great routine, Children will still get upset. Of course, they will. Life is full of upsets. Life doesn't always go the way they want. When they get

upset, do you as a parent take it personally? Occasionally we do, but we shouldn't, because kids just naturally get upset sometimes.

In the same way, when homeowners vent their frustrations at us, especially if it's over something that really wasn't your fault, you've got to learn not to take it personally. You've got to separate yourself from the drama unfolding before your eyes and ears. Step back and say to yourself, "These homeowners are going to be emotional at times. They may even be irrational at times." When children are screaming and crying you do not deal with them by screaming and crying yourself, do you? No, you try to set an example. You stay above the fray, to provide a calming influence. When you do, the "storm" or upset usually blows over in a few minutes. As long as you don't get emotionally involved in this upset, you'll gain points for maturity and control, and from that angle, emotional explosions, if they're properly dealt with, can be a blessing in disguise for you.

Let me explain what I mean.

## **The Zen Approach To Handling Homeowner Upsets**

I have a 4-year-old son. He throws tantrums. He sits down on the floor and starts to yell and pounds the floor. Now, for me to scream back at him or to get down on the floor and try to analyze what is going on during the process does not make any sense. What makes sense is to let him get done with the tantrum. When it's done, I pick him up, put him on my lap, put my arms around him, hug him, bathe him in some loving reassurance, and I let him know that everything is going to be fine. When I do that, he settles down because he knows everything is okay. This situation parallels remodeling when you're in someone's home.

When homeowners explode, they have just had a terrible day. When they came home, perhaps something was supposed to be finished. The kitchen was supposed to be finished, the roof was supposed to be on, or something else was supposed to happen, but when they walk in the door, they see that it didn't happen. Suddenly, all of the emotions of their day can be transferred to you. You've been in their house for weeks or months, and they're getting tired of it, and at this point they just unload. They walk up to you. They call you a jerk or worse, or they start with a laundry list of the things that have been bugging them and building up slowly, most of which you may not have even heard before.

I remember the first time I learned to deal with this situation successfully. I was in a particularly good mood—maybe that had something to do with it. The husband was out of town. He was with the State Department. The wife was a petite redhead, a real fireball. Normally Mrs. Jones was sophisticated and polite.

We had been in the house all summer. The job had had a lot of change orders. Mrs. Jones was a very hands-on sort of take-charge woman. Her husband

would come home off the road, and the following Monday, we would get change orders.

One afternoon in late summer, the cleanup work had been skipped because of a sudden, violent thunderstorm. I was off that afternoon estimating another job. When I arrived about 7 p.m. to check on things, the volcano erupted. I would never have guessed that this woman knew how to speak like a drunken sailor, but she did. She roared on for nearly 10 minutes. Instead of getting mad at her or trying to argue individual points, I just took it without reaction. I let it all wash by me and what a result.

After her torrent of profanity was over, she broke down crying. She'd had a bad day. Her 15-year-old daughter had threatened to leave home and left without saying goodbye as she slammed the door. Other things had been going on that day for her as she explained through her sobbing and apologizing. I never had a problem with her again, and they are a continuing source of high-quality referrals.

When people unload like this, and in my experience, the bigger the project, the more likely it is to happen, I don't defend a thing. I don't explain. I just listen. If I don't provide them with any resistance, at a maximum of 10 minutes, they just run out of steam. In this Zen approach to dealing with their anger, you want to let their anger just pass over you like a wave because, after that, it's gone.

They can't keep going. They can't keep that momentum up and if you provide no resistance, they simply run out of steam. When they run out of steam, they'll stop and say, "Well, look, I'm sorry. I just had a bad day. I know it wasn't your fault."

If you don't counter with your own emotional defense, they will quickly feel embarrassed, and you will look great. If you've been dealing with them in a professional way and you have followed the schedule, they cannot call you incompetent. Usually, you'll end up with a heartfelt apology, and this type of outcome forms a great bond that will smooth your way in the future.

I've seen some remodelers who are a little more thin-skinned. When a client unloads on them, they take it as "you're insulting my work," or "you're insulting me," and they get caught up in the emotion of the moment. Understand, that this process is an emotional one. If you get mad, no matter what reason, if you get caught in that emotional web, both sides lose.

## **You Told Them Ahead Of Time**

If you prepared your clients properly, after a brief calming down period, you can remind them that you told them early on that this situation would crop up. You expected it, and you're not offended by it. You can tell them that it happens on every job. In other words, you want to show some mercy, you want to let them

off the hook. The Chinese would say it let's them save face. You may even tell them that it may happen again sometime. Empathize that you know there are times when they hate you being there. They've packed up their clothes. They can't find the things they want. They get tired of the dust in the house. They're tired of not having a kitchen. It's either too hot or too cold in the house. They're tired of the materials. They're tired of the strangers. They've come home to their castle to get away from everything else. For the 3 or 4 weeks or months that you've been there, their home no longer serves as their retreat; they're no longer rejuvenated. Tell them that you understand all of that.

## **Be There for Them in a Crisis**

Even in the best-run jobs, you can still have a crisis. Who defines a crisis? They do. A crisis can be as simple as you showing up 20 minutes late for an appointment, but usually it's something more serious.

For example, let's say that you are fixing a section of their roof, and you've removed a portion of the roofing. At the end of the day you tied the tarp down, and everybody went home. But at 2 a.m. an unexpected thunderstorm occurs. The wind picks up, the wind tears the tarp open, rain is falling, and water is pouring into the house. At that point, they don't care if you're asleep. If they call you, and you've left the phone downstairs, or you've turned it off, and you don't hear the call, that's a crisis.

## **Projecting Childhood Experiences**

How your homeowners react to a crisis can depend a lot on the relationship they had with their own parents. If they had a good parenting experience, they may not react as badly in a crisis situation. But the key point is that the more negative their own experience with their parents was, the more likely they will be to project on to you suspiciousness, paranoia, anger, fearfulness, and anxiety. You don't have to psychoanalyze your homeowners to know how to keep their trust. The bottom line is that crises come in two flavors—bad and worse.

In either case, long-term benefits can result from a crisis situation if you know what to do.

## **Above and Beyond**

No matter how bad the crisis, no matter how upset the homeowners are with you, you can repair your damaged relationship with a technique called bonding. The immediate result of a crisis situation is that for the homeowners all their fears suddenly seem justified. You're a rat, you're a thief, or at least you're incompetent. You've ruined their home. All their money just went down the

drain. That's what they're thinking, and that's just what you'll hear to some extent.

Once their trust in you has been broken during a crisis, repairing it is difficult unless you go about it in exactly the right way. You deal with a crisis in a way that it works for you instead of against you in the same way you dealt with the anger situation earlier. Let them vent. Offer no resistance or defense. Don't try to explain why the trade contractor has messed up, and don't get emotionally involved either. Stay cool and be supportive. As they start to simmer down, remember not to defend your actions, just start providing reassurance. "I'll take care of it. I'll be here in the morning to clean things up. Everything is going to be fine."

Do more than take care of it. Go just a little bit overboard. Apologize again for what happened, and then ask them the simple question. "What will it take to make things right for you?" For example, if the temporary flood sets back finishing the kitchen a week, ask them, "Do I need to give you five dinners out?" "Do I need to come in and cook for you?" "Do I need to provide limo service to your favorite restaurant?"

When a crisis strikes, you need to bond with these people quickly. You want to respond generously and quickly.

I know a remodeler in Washington, D.C. who, when he missed a deadline, provided hard-to-get tickets to the local professional football team, the Washington Redskins. The homeowner, while being upset, couldn't believe that he had those tickets in hand. When you deal with a crisis effectively, your clients are going to regain their trust in you quickly because of how you deal with the crisis. You can be behind schedule, but they won't be angry because you took care of them when they needed it.

The truth is, parents do make mistakes, but what we do after we make those mistakes is what our kids remember. The homeowner's receive the message that you take customer service and customer satisfaction seriously. When you respond generously and quickly to this kind of complaint, you will stand out, and this kind of response will set up a talk chain. In the magazine business, this kind of action is called a "Talker," because it gets people talking. The homeowner will tell a friend, and that friend will tell another friend. This chain will end up generating so many referrals that you won't take long to figure out that a complaint is really a great opportunity to go above and beyond.

## **Pager Time**

No matter how good you are, a crisis may happen on every job. When your clients get into crisis, who are they going to call? The remodeler. What happens if they can't find you? Panic! Never underestimate the power of a pager or a cellular phone to prevent panic during that inevitable crisis. When people have



a crisis, they want to talk to you now, not 2 hours from now, or worse yet, later that evening, or impossibly worse yet, the next day. When homeowners know that they can always get in touch with you right away if they need to, it really disappates their fears.

So in short, run towards crisis, not away. You don't get many opportunities to bond really tightly with your clients, and a crisis is certainly the fastest way, and in the long run the cheapest way, to do it. Whether the situation really seems like a crisis to you or not, it is to them, and if you want to be smart, treat every crisis as an opportunity, a big opportunity. When bonding is done well, it creates a phenomenal relationship. You literally become family friends. You trade holiday cards, and these same clients will provide you with a steady source of referrals for years to come.

---

# 3

## Job Procedures

**M**y life philosophy is to take the pain early, not just in remodeling, but also in all things. Putting off never really makes bad things go away, and putting the bad news out front usually ends up with much less total pain.

How does this situation relate to remodeling? Experience is a hard teacher and in this regard it's taught me a lot of hard and expensive lessons. Here is what I've learned:

- Be very clear with prospective clients early on how you do what you do. If they don't like the way you work going in, you'll be money ahead in the long run to just walk away and go get another client.
- You need to explain your remodeling procedures on paper in advance. Your clients need to understand them and agree on your procedures at the outset. If your clients don't want to follow your job procedures, you want to know it earlier not later. If they don't like your job procedures, do you want them as a client?

I understand that the industry has some bad contractors. I have also discovered, through personal experience, that it also has some bad clients. If your prospects are not thrilled by your procedures, you need to make a decision. If they are going to be so emotional and so distrustful that they still want control even after you've reviewed your job

procedures, these people may be the problem clients that you don't need. By thoroughly reviewing how you manage a project with a homeowner before a job ever starts, you are taking them through a qualification process. If they agree to follow your procedures and you estimate and manage the project correctly, you have a good chance of making money. If they resist your procedures and argue for control, they are letting you know right up front that they intend to "help you" manage their project.

In my seminars, I ask who has had problem homeowners, and literally the whole group raises their hands. The next question I ask is, "For everyone who has worked with a problem homeowner or with a homeowner from \_\_\_\_\_ as I like to say, when did you know they were going to be a problem?" Over 90 percent of the remodelers knew during the first meeting.

How did they know? They couldn't be any more specific than "something did not feel right." They had some subtle signals, but they didn't pay attention to the mixed feelings they were having about the potential clients.

Think about it. Don't these difficult homeowners let us know they will be difficult early on? They may not be saying it orally, but in the course of our first meeting with them, they send certain signals. At first you may not know it intellectually, but after the bad and expensive experiences pile up, eventually you learn to identify that uneasy feeling.

And the problems do pile up. At first, you get a gut feeling but you ignore it. I used to take jobs with problem homeowners because (a) I either needed the money; (b) I was trying to keep someone on my staff busy; or (c) I was feeling particularly good about myself and thought I could handle anything. "I can handle this; I've dealt with worse people than this."

When you are lying in bed at about 2 a.m. 6 months later and you are reflecting back on this job that was supposed to be done 3 months earlier, but is still not finished, you understand how bad a decision you made. At times like this, you realize that with problem homeowners you don't make any money. But worse than that, you destroy the morale of your company. When you have problem homeowners, carpenters and trade contractors do not like going to the job, people who answer the phones do not like speaking to these homeowners, and worse yet, you don't like going to work.

In the same vein, think about the clients that you have enjoyed working with, who have enjoyed the kind of work you've done and paid you accordingly. Homeowners will pay you what you are worth when you provide these badly needed services, and they will treat you with the same respect that they afford their doctors or lawyers.

Enough homeowners are out there right now who want you to do a good job, and you will enjoy working for them. These are the people I want you to concentrate on working with, so the focus of this section is how to avoid problem homeowners.

## How to Avoid Problem Homeowners

When you get a bad feeling, and you will get it soon after meeting these people, pay attention to that feeling. Look for the subtle signals there. If you're wondering about whether you should work with this person, bring in a project manager or a carpenter, and get his or her impression. Employers don't have the emotional involvement that an owner may have. You want to get them involved, so you can see what your mixed feelings are about. If something is unsettled during these initial meetings, do something about it. Remember, you are the expert. You establish the boundaries. You have set job procedures and if everyone involved follows these, the jobs run smoothly, the jobs get finished, and you make money. But while you establish these boundaries and these priorities, your clients have to agree to them. If these homeowners are not agreeing to these priorities, you may have to stop. These may be the problem clients you need.

## Fair Compensation

I'm not saying you can't work with demanding people. You need to identify the source of the problem and put a price on dealing with that problem. If someone needs additional hand-holding during the renovation process have them express that they want more than you have reviewed in your standard job procedures. They can have more, but let them know the price of this additional service because all we have to sell is our time. If they want more, they need to compensate you for your time. I only resent working with demanding homeowners when I'm not fairly compensated for my time.

## The Preconstruction Meeting

Remodeling is a bit like having 15 strangers over to play football in your living room for a few weeks. They all arrive and depart at different times, and each is determined to make a mess of your home. It may not be that bad, but remodeling will disrupt just about every routine you have; including some you're not even aware of.<sup>3</sup>

Because the homeowner's life is about to be turned upside down, you must make the preconstruction meeting a necessary part of your schedule with your homeowners. Schedule the meeting for no less than 2 weeks before construction begins and be sure your primary people are in attendance; yourself; perhaps a salesperson, if a salesperson is involved; the lead carpenter; and the homeowner and spouse, if the homeowner has one. I know this may be difficult, but in married households, both partners should be in attendance for every major meeting because of the decisions that are involved.

This meeting serves at least two functions. First, you'll review the scope of work and construction schedule portions of your contract to answer any questions. Secondly, you'll discuss and arrive at a set of ground rules that balance the homeowner's quality-of-life requirements with your need for access to and freedom within their home and on their property.

## Ground Rules

Take the time to set up some ground rules. Decide on as many as possible as early as possible during your preconstruction meeting. In addressing these questions before the project has begun, resolves issues before they have an opportunity to become a problem. This planning and organizing is part of what you are being paid for. You are managing the homeowners' expectations and an excellent remodeler does this proactively. The agreement that I have homeowners sign at the preconstruction meeting appears in Figure 3-1.

The form in Figure 3-1 is just a start. Develop your own questions that reflect your particular concerns, needs, and the nature of your project. Think about these important issues before the meeting. Don't be afraid to bring up anything, no matter how small. Remember, this preconstruction meeting is the basis for job ground rules and gets things off to a smooth start.

## Job Procedures

You must take the time to discuss this topic thoroughly. Your remodeling contract will address some of these issues under the General Conditions, but you need to review exactly what the language in the contract means to both you and the homeowner. More than likely you have conflicting assumptions and expectations, so expose these now, otherwise they will pop up unexpectedly, cause tempers to rise, and slow the construction work.

Listed below are my job procedures. With these, my homeowners know what I'm going to do and how I am going to do it, and they know that I have a plan that I follow every day. These job procedures, just like the ground rules, allow us to deal with any potential issues right up front.

**Contact Numbers.** I let them know how they will be able to reach the project manager or me by phone, fax, cell phone, or pager.

**Supervision.** I will review supervision. Who is going to be on the site and when they are going to be there. We will also discuss the time that the workers will be showing up in the morning and when they are going to be leaving.

**Weekly Progress Meetings.** I schedule a weekly progress meeting. Every week we will need to discuss matters that come up. They'll know that on Wednesday morning or Thursday morning at 6:45 or 7 a.m. that they are going to see me. They don't need to worry; they know I will be there to meet with them.

**FIGURE 3.1 Ground Rules Contract**

1. What time will daily work begin and end?

---

---

2. Can work be scheduled on weekends?

---

---

3. If weekend work is an option, do your clients any special restrictions?

---

---

4. If an after-hours emergency occurs, who do your clients call?

---

---

5. Who do the clients talk to about change orders?

---

---

6. Who do they take day-to-day comments and suggestions to?

---

---

7. When do you want the weekly homeowner meeting to occur? (Homeowners' meetings bring the builder and homeowners together at regular intervals to address questions and review progress.)

---

---

8. Will any work areas need to be completely cleared of furniture? (Note: Many remodelers state in their contracts that they shall not be responsible for any valuables left in any area under construction. The possibility of accidents is too great.) Specify.

---

---

9. Where will workers store their tools and building materials?

---

---

**FIGURE 3.1 Ground Rules Contract (Continued)**

10. Which outside area(s) will bear the brunt of construction activities and what protective measures does the homeowner and remodeler need to take?

---

---

11. Does any landscaping need to be moved or protected? Fencing? Flower Boxes? Other?

---

---

12. How can the homeowner and remodeler lessen the impact of construction?

---

---

13. Where will pets, if any, be kept during the remodeling process?

---

---

14. If the household includes children, what rules apply to them around the work site during working hours?

---

---

15. What dust containment procedures will the remodeler employ?

---

---

16. What kind of cleanup will take place at the end of each day?

---

---

17. What restrictions, if any, will employees and trade contractors have on their use of the telephone? Bathroom?

---

---

18. Will you establish a designated eating or smoking area?

---

---

**FIGURE 3.1 Ground Rules Contract (Continued)**

19. Does the job site have any parking restrictions that the remodeler should be aware of?

---



---

20. What times, outside of the weekly homeowner meetings, is the lead carpenter available for questions?

---



---



---

Signed (Homeowner)

---

Date

---

Signed (Homeowner)

---

Date

---

Signed (General Contractor)

---

Date

**Cleanup.** We clean up at the end of every day, but I want to define what cleaning up means. We broom clean. We will not go around with a shop vac every day while construction is still going on. The homeowners need to understand what the daily cleanup really means.

**Construction Schedule.** I provide a construction schedule. This schedule lets people know what is going to happen and when it is going to happen. The schedule reassures people.

While some remodelers do not include construction schedules (also known as production schedules) in their construction contracts, I recommend that you provide one as a part of any contract you sign. They're easy to fill out and easy to follow, and bring amazing peace of mind to your homeowners. Also, provide this same schedule to trade contractors before a job starts. It lets them know exactly when they are expected.

The schedule doesn't need to be elaborate or complicated; it just needs to list what work will take place beginning on which date and when that same work will be completed.



In lieu of a performance clause that may or may not encourage quality construction and teamwork, the schedule is the means of demonstrating that work is proceeding on time. Post a schedule on site. As work progresses, highlight or draw a line through completed tasks. Homeowners get a real sense of completion as they see tasks being marked off, one by one. This process also gives trade contractors a sense of completion.

On your side, use this schedule as a reminder to call the trade contractors two or three times to confirm when they will be needed onsite. You will note that the schedule also shows when draws will be paid. This schedule acts as an effective and yet subtle reminder to homeowners to authorize their payments on time.

**Change Orders.** I review my change order procedures up front and in complete detail. The homeowners that I work with understand that no changes will be made to the plans until both the homeowners and I review them. They understand that I have 5 days to respond to change orders in writing. Naturally, exceptions to this rule occur, but I want them to know that change orders are expensive and have to be reviewed carefully before incorporating them into the work schedule.

Change orders must be addressed in the contract because they affect your business so dramatically. For example:

- Changes may necessitate new drawings. The architect may not be able to redraw the plans quickly, and therefore the job may experience additional delays and expenses.
- Liability may increase because the increased possibility that all changes will not be recorded on all copies of all contract documents. As a result, some trade contractors and suppliers may unwittingly work from outdated and incorrect documents.
- Changes must be re-estimated and processed and take up additional time to complete.
- Changes disrupt the remodeling schedule.

Because of these inconveniences, a change in the scope of work usually entails additional expense to you, the remodeler, which you then pass on to the homeowners. Because changes can also be initiated by you, the remodeler, make sure you include a change order policy and procedure to this effect in your contract. To eliminate misunderstandings, require that any and all change orders be submitted in writing. Too often I've heard stories of remodelers handing homeowners a stack of change orders at the conclusion of a project. Many homeowners then go into shock because they were not prepared for the bill they receive. Your clients must know the cost of a change prior to approving the work. Providing your clients with the cost of a change order along with terms for payment ahead of time is more work for you, but it locks them into a set

price and payment schedule and it allows you to ensure payment as the job progresses.

For changes made on the spot, say during a weekly homeowner progress meeting, put them into writing and submit them to the homeowner within 5 days of the change with all costs specified. Include the following points in the policy and procedures section for change orders:

- The company will provide all change orders to the homeowners in writing with all materials and labor costs specified.
- Change orders may require a new date for substantial completion.
- State specifically that any change order can be implemented only upon the homeowner's and remodeler's signature.
- If the parties cannot agree on a price, the contract should include a provision that the remodeler will be paid a set percentage beyond the cost of labor and materials.

Since most homeowners do not really understand the cost of remodeling, a small change can be much more expensive than they would ever have imagined. Make sure you find out the cost of any change ahead of time. Because change orders take time to research and process, some remodelers will process only a certain number of change orders at no cost. Once a homeowner exceeds that number, you may want to add an administrative fee to complete additional orders. You may want to include the number of gratis change orders plus the processing cost of each change order beyond that number.

You may want something in your contract concerning the response time of the architect. Nothing will slow down a job more quickly than an architect who takes 7 to 14 days to redraft any changes. See Figure 3-2 for an example of a change order.

**Job Book.** I place a job book on the site. A job book is a notebook that lets homeowners record their concerns. It gives them a place to write their comments when I'm not there. And every day either I, or the lead carpenter looks at the job book to see if the homeowners have recorded any concerns. We promise to respond to any comments recorded in the job book within 24 hours.

**Contract Review.** A thorough contract review occurs before the contract is signed. Before the job begins, I do another contract review so that everyone knows what is expected. This review is clear and easy to understand, but we're making sure that we're in agreement on what is going to happen, when it's going to happen, and who is responsible.

**Clear Job Specifications.** Lastly, as part of my contract, I provide homeowners with a large specifications list, which details every conceivable item that can go into a remodeling project. With a detailed specifications list, your clients know that they will have few cost overruns, and you will have identified all of the parts that are going into their project.

### FIGURE 3.2 Change Order

Job Name: \_\_\_\_\_

CHANGE ORDER # \_\_\_\_\_

DATE: \_\_\_\_\_

OWNERS: \_\_\_\_\_

OWNERS hereby authorize the following changes in the plans and specifications of the above described construction project, and/or order that additional materials, supplies, services, labor and other items listed below and/or requires to complete this Change Order to all other terms and conditions in the contract with (Your business name here)

Charge Order Amount \$ \_\_\_\_\_

Payment for this Change Order is due upon completion of the change order work. All provisions of contracts between the above parties pertaining to the above job are applicable to this agreement. This Change Order may extend the time required to complete the project. Please see paragraph "Extra Time" in your contract.

OWNER: [Your business name here]

Accepted this \_\_\_\_\_ day of \_\_\_\_\_

By \_\_\_\_\_

By \_\_\_\_\_

Page \_\_\_\_\_ of \_\_\_\_\_

---

How do you show a homeowner all the parts that go into a renovation? How do you let them know how many choices they will have to make as they decide on what they will do?

Specifics eliminate confusion, and misunderstandings. Detailed specifications clearly specify what the materials are being used in a project. The client experiences no surprises. Nothing is left to chance. Detailed specifications means more work up front, but it provides immense advantages:

- When all or most product selections are made prior to starting a job, the job cannot be delayed by homeowner indecision. If all their decisions have been made, you can order any special items that have a long lead-time, and you can schedule a project effectively.
- You now have a document that provides your lead carpenter with everything he or she needs to run the job. If you have carefully specified every

part, your lead carpenter or production manager will not need to call you about any of the specifications; they will have all of the information right in front of them.

The complete specifications list included in Appendix B and the sample specifications index included in Appendix C are also on the accompanying diskette. The complete specifications list included in Appendix B addresses every building element you are going to need for any addition or renovation, beginning with permits and bonds, and going all the way to doorstops and any special projects.

You usually think of specifications as the list of materials necessary to build the structure represented on your blueprints. And you are right, but I think of them also as a sort of informal insurance contract. A complete set of building specifications also will help guard against cost overruns and disagreements between you and your client.

The specifications contained in your contract should detail the exact brand, make, model, number, style, type, color, shade, size, weight, thickness, and any other “description” of all the materials you will use to complete any project. Such a set of specifications eliminates the gray areas between you and your clients and enables you to tell them exactly how much their project will cost.

Probably none of your jobs will include all the specification items listed in Appendix B. In Appendix C, I’ve included a sample specification list from a completed project I did. It contains only those material specifications relating to that project. Individually tailor this master list to fit each individual project you do so it includes only the specifications you need for that project.

Dealing successfully with emotional homeowners requires a proactive management approach from the remodeler’s side. Address a homeowner’s underlying fears before they ever have an opportunity to interrupt and undermine the progress on a job. To facilitate this, Appendix D includes 4 checklists that will assist you in dealing with potential trouble spots. The checklists are: Preliminary Job Checklist, Project Completion Checklist, Project Selection Checklist, and Project Startup Checklist. Use these checklists to deal with areas that have been a repeated source of homeowner complaints.

## **Dispute Resolution**

In spite of all your best efforts, you could still experience conflicts that you may need help resolving. Because of this situation, you need to consider including a standard Dispute Resolution Clause in your remodeling contracts. Because of the high cost of litigation, dispute resolution usually is much less expensive alternative if major disagreements arise. The emphasis in the previous statement

is on the word “major.” If a disagreement ends up in the hands of attorneys, you could experience major delays and expensive legal bills.

Alternative dispute resolution can become expensive if the parties get involved in discovery. Discovery would include the parties exchanging documents, answering written questions, and taking definitions. Because of these potential pitfalls, see if you can create an *informal* dispute resolution agreement between you, your client, and your architect or designer. It would be an understanding about how the team would seek to resolve any disagreements quickly and efficiently. This informal agreement will simply state what the team will do if a disagreement occurs. This approach represents a proactive commitment to work together.

If a problem can't be resolved within the team, the members may select an independent person—for example, a building code inspector or a licensed home inspector—to act as an informed independent arbiter. This informal agreement should state that all parties agree to accept the decision of this independent person. You want to resolve disputes quickly, for example, within 48 to 72 hours, so that the disagreement is not allowed to create any real slowdown.

If a dispute cannot be resolved, you'll be forced to go into dispute resolution, preferably mediation first. If an agreement cannot be reached in mediation, binding arbitration usually is still preferable and less costly than going to court. Let's look at both.

## Mediation

Mediation is the first step in low-cost dispute resolution. The American Arbitration Association (AAA) will administer the mediation process to achieve an orderly, economical and expeditious agreement. If a disagreement can be solved by mediation, your relationship with the homeowners may be saved as well as your project. The AAA maintains panels of topflight mediators who can usually come in for a fraction of the cost of taking the dispute to court. A sample clause for your contracts specifically tailored for the construction industry by the AAA appears below:

If a dispute arises out of or relates to this contract, or the breach thereof, and if said dispute cannot be settled through direct discussions, the parties agree to first endeavor to settle the dispute in an amicable manner by mediation under the Construction Industry Mediation Rules of the American Arbitration Association, before having recourse to arbitration or a judicial forum.<sup>4</sup>

Any party to an existing business dispute may ask the AAA to ascertain whether the other party or parties are willing to submit the dispute to alternative dispute resolution (ADR). An AAA representative will explain the various

dispute resolution techniques and assist the parties in choosing one that meets their needs, or the contract may specify the choice.

The case filing or setup fee for mediation is \$300. Additionally, the parties involved are charged a fee based on the number of hours of mediation time used. This hourly fee varies regionally. Beyond mediation, ADR might take the form of arbitration, a mini-trial, or any variation of these procedures on which the parties agree. In any case, they are less expensive than going to court.

## Arbitration

If mediation fails, the next step in the ADR process is arbitration. The AAA Construction Industry Arbitration Rules, includes a fast track provision for claims under \$50,000. Arbitration involves a \$500 filing fee for claims under \$10,000, and for claims between \$10,000 and \$50,000 the fee is a \$750 plus a \$150 hearing fee per party. An arbitrator is appointed within 7 days of the request for arbitration. The arbitrator holds a hearing as soon as parties can get together. A binding decision is rendered no later than 7 days from the date of the hearing. However, in the event of an adverse decision by an arbitrator, your right to appeal could be limited.

The standard arbitration clause for construction contracts as recommended by the AAA follows:

Any controversy or claim arising out of or relating to this contract, or the breach thereof, shall be settled by arbitration administered by the American Arbitration Association under its Construction Industry Arbitration Rules, and judgment on the award rendered by the arbitrator(s) may be entered in any court having jurisdiction thereof.<sup>5</sup>

If a dispute does arise, call the AAA at (212) 484-4000 for more information. It has suggested dispute agreements and many other tips once a dispute does break out that you are unable to resolve.

## Summary

You can successfully manage a remodeling job by managing emotional homeowners. They're all emotional so spend a little time understanding their fears and then building trust. The three major steps include—

**Understand them.** Realize that this period is an emotional time for the people you work for. They are going to have upsets. Expect them and be ready to deal with them. It's also a fearful time. Gear everything you do toward reducing their fears.

**Build trust by assuming a parental role.** Be consistent. Be honest. Keep your promises. Provide reassurance.

**Keep them informed.** Agree to job procedures before the job starts. Provide them with a paper trail of everything that's going on.

Now, I cannot promise you that the information in this book will help you avoid every adversarial experience that comes up during the remodeling process. However, this information will allow you to manage most of them. When you learn to do this well enough, you can give this book to some of your lead carpenters and even administrative people. They can help to build a strong customer base, and this customer base will provide you with ongoing customer referrals. Now you can begin to pick the jobs you want to work on, because this management skill is in strong demand.

Remodeling is a service business, and people work with people they like. These strategies will allow you to manage the most unpredictable part of your business—the emotional homeowner.

## A

# How to Find the Remodeler You Really Want

## *A Remodeler Selection Guidebook*

DAVID LUPBERGER

Virtually all homeowners approach the remodeler selection process with a mixture of excitement and anxiety. Deciding to remodel your home is exciting, but it can also be a fearful because your dream home and thousands of dollars are at stake. Feeling confident that you'll choose well is difficult when these mixed emotions are present.

Your fears don't have to rule you during the selection process because you can find an excellent remodeler. This booklet will show you how to build a list of qualified candidates to remodel your home, and it will explain how to test them so you can choose the one best suited for your job. You'll find the selection process is not only manageable, but also informative and rewarding. As a bonus, it can aid in the development and refinement of your dream home design.

Summarized below are the simple steps you'll need to take to find the right remodeler. As you look over this list you may think it looks too easy and obvious to be of any use. On one level you are correct. When you think about it, the plan is obvious and straightforward. But as you read on, you'll see that the booklet equips you with two powerful tools that make you master of the process.

- You'll learn to ask the questions that matter most.
- You'll learn who to ask those questions to and when to ask them.



## Locating Happy/Satisfied Remodeling Veterans

If you're planning a remodeling project, begin your search for competent, reliable, and honest remodelers in your own neighborhood. Take a drive to discover where remodeling jobs are underway and begin collecting names. Most remodelers will post signs promoting their services in front of homes in which they are working. Also look for other clues such as trade contractors vans or trucks or construction dumpsters. Whether you see a sign identifying the remodeler or not, knock on the door and speak with the homeowner.

Better remodelers understand that if they do a good job, they're usually guaranteed more work in that neighborhood. I know of no better source of high-quality referrals than a happy homeowner, so the better remodelers will work hard to leave a legacy of satisfied customers.

Another source of leads is friends or colleagues at work or school, clubs, professional organizations, or charity or service organizations you belong to. Be bold! The more people you ask, the more names you'll be able to gather. Be sure the people recommending the remodeler have personal experience with his or her work.

You may find your next step, contacting these homeowners, to be quite engaging. I have found that many people who have recently completed a remodeling project want to talk about it. These folks are overflowing with information from this once-in-a-lifetime experience and are full of stories they may want to share. Your visit with them will be well worth the time.

And not only are their memories of the stories, characters, and events fresh, but of their memories of the emotional roller coaster are as well. Your connection with these homeowners will be valuable both for the information they provide and the perspective they bring. They'll want to share their highs and lows with you because they've been in your shoes, and they know something about how you're feeling at this point in the process.

## Additional Sources for Remodelers

Other sources aren't as dependable. For instance, you can use the phone book. But, are you willing to spend thousands of dollars based on a random lead you get from the *Yellow Pages*®?

While you shouldn't have any problem locating remodeling veterans, I've included the telephone number of the major professional organization that can provide names of remodelers in your area.

There are 2 primary trade organizations that represent remodelers. You can contact the National Association of Home Builders (NAHB) Remodelers Council at 800-368-5242, ext. 216. The NAHB bookstore has published 3 consumer information brochures entitled the "Remodeling Your Home" series.

They are (a) “How to Find a Professional Remodeler” (b) “Understanding Your Remodeling Agreement” (c) “How to Live With Your Remodeling Project.” All 3 can be purchased from the NAHB bookstore for \$3. You can also call the local National Association of the Remodeling Industry (NARI). The office number is 703-442-8453. Ask for the most recent NARI Home Remodeling Guide that will list industry members in your area. Because the purpose of these associations is to promote professionalism and image within the remodeling industry, association members probably are more reliable than remodelers who aren’t members.

## Contact Home Owners

Most remodeling veterans, whether their experiences were good or bad, are happy to share what they learned. They not only will give you the name of their remodelers and a view of their finished jobs, but they also are likely to share their design ideas and what they learned during the process.

Most veterans I interviewed believe their experience qualifies them as experts. They have a clear perspective of their remodeling project and, given a second chance, would always do some things differently. They think they have a great deal to share with the uninitiated about how the remodeling job really went, what to expect, and how to cope with delays, changes, breakdowns, and the general upsets that accompany such an undertaking.

Don’t hesitate. Your request is quite reasonable: you want a bit of their time, a peek into their homes, and their opinions of their remodeler. Call them now!

## Homeowner Interviews

Once you’ve contacted a few homeowners, and they’ve invited you over, make the most of your opportunity. Be sure to address the following four issues:

- Discover the quality of the homeowner’s experience with the remodeler. Was he or she competent at all points in the process? Would they use him or her again?
- Examine the project for possible design ideas. Notice how you feel in the new space.
- Try to assess the quality of the work. Look closely at the project.
- Ask how well the remodeler predicted the cost of construction, specifically the preliminary estimate compared with the final cost. They usually will not be the same, but find out how far apart they were and how easy it was to arrive at a final contract price. Ask how much change orders affected the final price.

There is a list of detailed questions, located at the end of this section, to guide you.

Six to twelve months after a job has been completed is an excellent time to interview homeowners. During that interval their remodelers will have responded to some warranty item claims. (Note: the industry standard is a 1-year warranty on all labor and materials installed by a remodeler and not covered by a manufacturer's warranty.) Because professional remodelers address warranty claims quickly and thoroughly, such claims are an excellent test of their reliability and professionalism.

You'll find that visiting remodeling projects are an excellent source of design ideas. Ask the homeowners how they arrived at their particular choices. This information will both help focus your own ideas and develop your understanding of the design process.

In your tours of these different homes, you'll begin to appreciate the different levels of attention to detail and quality of finish. You'll begin to discern a good drywall job: smooth, blemish-free walls and ceilings with invisible seams. You'll begin to recognize quality interior trim work where the joints are tightly fitted—in contrast to poorer jobs with gaps and misalignments. You'll begin to appreciate that better remodelers stay on top of all details all the way through to the end of the project. Here is a list of essential homeowner interview questions:

1. Could they communicate well with the remodeler?
  - a. Did the remodeler listen to their concerns?
  - b. Did the remodeler respond quickly to their questions and requests?
  - c. Was the remodeler easy to speak with?
2. Were they pleased with the quality of the work?
3. Were they satisfied with the remodeler's business practices?
4. Did the remodeler add value engineering (cost saving suggestions) and provide price checks (ongoing estimates regarding the finished project)?
5. How close was the preliminary estimate the remodeler provided to the final contract price?
6. How did the remodeler and homeowner resolve any differences that arose during construction?
7. Did work crews show up on time?
8. Were the homeowners comfortable with the trade contractors the builder used?
9. Did the work crew clean up the jobsite daily?
10. Was the job completed on schedule?
11. Did the remodeler fulfill his or her contract to the homeowner's expectations?
12. Did the contractor stay in touch with the homeowner throughout the whole project?

13. Was a project manager or lead carpenter on the site every day?
14. Was supervision adequate?
15. Did the homeowner find the remodeler easy to reach?
16. If the homeowner hired an architect, how well did the remodeler work with that architect?
17. Did the remodeler hold regular progress meetings with the homeowner?
18. Were final details finished in a timely manner?
19. Would you use this remodeler again without hesitation?
20. Was the remodeler trustworthy?
21. Do you believe that you got good, satisfactory value for the money spent?
22. How has the remodeler handled warranty claims?
23. Would you recommend the remodeler unconditionally?

The more you learn, the greater your comfort. The greater your comfort, the greater command you will have over the selection process.

Come prepared with a camera, pen and paper, or a tape recorder. Be sure to ask for permission to take notes or photos. You'll want records of what you learn as you begin to compile a list of possible remodelers.

## **The Introductory Call: Your First Contact with Prospective Remodelers**

Most people don't like interviewing remodelers because they don't have confidence in their ability to discern if a remodeler is honest. If you've done your homework with thoroughness and patience, you've spared yourself that anxiety because you already know your candidates are qualified, honest, and reliable.

At this point, you should feel confident about your list because you've already prequalified the names on it. If you don't feel confident, you need to ask yourself why. Then you need to call back homeowners and get the answers you need.

When you begin interviewing remodelers, your task will be to locate one you can work with, one whose interest in your project impresses you, one who listens carefully to what you say. The goal of this quest is to find compatibility with a remodeler whom you'll be able to work with successfully for the 6 to 12 months a large project may take.

Once you're ready to begin the interviewing process, call the remodelers in the order you've rated them. Be prepared to describe your project and state when you'd like to begin construction.

To give you a peek at how prospective remodelers may handle your call, let me tell you how I deal with initial conversations. As a professional remodeler, when I speak with prospective clients, I attempt to gauge their seriousness by

asking specific questions about their design ideas and budget. If they're planning an addition for instance, I ask if they know how large they want the addition to be and what rooms will be included. I want them to describe to me what they want in as much detail as they can. I also ask if they've thought about what grade of finish materials they'd like. For example, will kitchen counter tops be a laminate finish, ceramic tile, or polished granite? Will bathroom fixtures be brass or chrome? Will the new rooms have hardwood flooring or be carpeted? These questions give me a good idea about the level of finish the homeowners are considering, and begin to give me some preliminary ideas about the cost of the project.

I ask if they have a preliminary budget for their project. Their response lets me know whether or not they understand the true cost of remodeling.

Professional remodelers are extremely busy. You may have to be patient as you attempt to set up your first meetings. If someone you like doesn't return your first call, give him or her a second chance. If they don't return that call, cross them off your list. Just as you want to avoid fly-by-night remodelers, you also want to avoid someone who is too popular. If a remodeler doesn't have time to return your call now, you can imagine how stressful that could be after work on your house begins.

When you call the remodelers on your list, have three to five preliminary questions ready to ask each of them, such as:

- Have you completed a job similar to this before?
- If you have, may I see it?
- Do you have a list of references that I can contact?
- When will you be able to start the job?
- When could we meet in person to further discuss this project? (use this question only if you're encouraged by the answers they give).

I have no set script for these calls. In fact, in the course of some conversations a remodeler may offer everything suggested above and more. Be aware of how easily the conversation progresses. When you hang up, make a few notes on the conversations. What were your impressions of the remodeler? Did he or she listen well? Did he or she answer your questions thoroughly?

## **Your First Meeting with Preselected Remodelers**

In this new relationship, common courtesy is a must and professional remodelers understand this fact. If a remodeler fails to show up for your first meeting and does not call to reschedule, cross that one off your list.

All principal parties should be present at this initial and all subsequent meetings. This includes the remodeler and both spouses, if applicable. Given the number of interviews you (and your spouse) will have, plus the number of

subsequent design and planning meetings you'll have once you settle on a remodeler, this requirement may seem unreasonable. But it's absolutely essential for all parties to participate fully in this process and for everyone to operate with equal information.

Questions you should ask the remodeler during your first meeting are listed below:

### **Business Identity**

- How long has the firm been in business?
- What is its permanent business address?
- Is the prospect licensed to work in your area?
- What year was the business initially licensed?

### **Business Practices**

- What will the payment or draw schedule look like?
- How does the company ensure that warranty service complaints are effectively handled?
- How does the company maintain good customer relations throughout the construction and warranty period?
- In case of any accident, is the company insured against workers' compensation claims, property damage, or personal liability?

### **Building Practices**

- Who will be assigned as the project manager or lead carpenter?
- Who will be your contact if that person is not available?
- Will a supervisor be on the site full time?
- Will the company provide a written remodeling schedule?
- What's the company's routine regarding regular meetings with the homeowners during the remodeling project?
- Who will attend those meetings? Will the remodeler personally attend every meeting?
- Can I expect to see workers at the site every day?
- Does the remodeler plan to stay personally involved in the project at all points?
- May I have the names and numbers of five homeowners you've completed projects for?
- May I visit a site where work is in progress?

Note: A visit to a site in progress can reveal much about a company's ability to manage a large project. Notice how organized it looks. Is it messy and chaotic or does it seem well-organized with workers moving like they know what they are doing?

This list is not intended to be exhaustive. In fact, it should help you generate other, more personal questions.

As with homeowner interviews, ask any questions you may have. Asking good, detailed questions is the heart of your research. If you don't question thoroughly, you're giving up your responsibility in this process and possibly compromising the quality of your project.

## **To Narrow the Field: “Trust But Verify”**

You should suggest second meetings with your preferred candidates to discuss your project in greater detail. Second meetings provide an important chance to ask those questions you overlooked in your first meeting, plus the key questions that will enable you to identify the remodeler you'll move forward with.

As you're planning these second meetings, I recommend employing former President Ronald Reagan's philosophy of “trust but verify.” Trust the representations your favorites make, but verify them. Your due diligence may protect you from confusing an itinerant contractor with an established professional remodeler.

Follow the steps listed below to objectively verify your candidates' business representations. Among them are several items you should address during your second meetings if you didn't during your first.

- The business should be licensed, bonded, or registered, when the law requires it. Call the building department in your local jurisdiction to find out the exact city, county, and state requirements and verify the appropriate licensing of your candidates.
- Obtain proof of insurance. The remodeler should supply you with a Certificate of Insurance indicating the company has sufficient general liability and workers' compensation insurance. Additionally, the remodeler should have coverage against theft of any materials delivered to the jobsite but not yet installed.
- Confirm the remodeler's business address. He or she may have an office, but remodelers commonly work out of their homes. Ask for a visit just to confirm your candidate isn't working out of the back of a truck. What you're trying to determine is your candidate's permanence.
- Ask if you may run a credit report on your candidates. Honest businesspeople won't have a problem with your request. (You can actually request credit reports from your local banker or Realtor<sup>®</sup>. You will need to obtain the remodeler's permission, perhaps in writing, his or her full name, address and social security number to secure a report.)
- Ask the remodeler for a list of the suppliers and trade contractors he or she works with regularly. Contact a sample from this list to confirm the

remodeler manages his or her business responsibly, paying trade contractors and suppliers on time, and that the business has a good reputation in the building community. This line of inquiry is particularly important because it may prevent you from having a construction lien placed on your property by an unpaid trade contractor or supplier.

- Call the Better Business Bureau and your local consumer affairs office to check the company for consumer complaints. Better Business Bureaus (BBBs) are nonprofit organizations supported primarily by local businesses. They encourage honest advertising and selling practices and keep records of consumer complaints. Check your candidates' records, but remember that just as unreliable remodelers exist, unreasonable homeowners also exist. Even an excellent remodeler can receive a complaint. If a favorite candidate has a complaint, ask for information about its resolution. If the remodeler addressed it quickly and to the client's satisfaction, that action is a sign of professionalism.

City, county, and state consumer protection offices may provide consumers with additional information. Consumer protection offices often receive complaints from dissatisfied homeowners regarding poor construction work. These offices investigate those complaints and if necessary prosecute offenders.

## Making Your Choice

After you've held your second meetings and narrowed your candidate list to one name, you are ready to choose your remodeler.

You are ready to move ahead if you're confident your remodeler meets these two principal selection criteria: (a) The remodeler is committed to fulfilling your desires, and (b) the homeowners he or she has worked for in the past testify that he or she provided excellent value and delivered high quality work. Work with this remodeler to create a design and specifications for your project.

A design contract often is the first step because architects, design/build firms, and many remodeling companies charge design fees for the preparation of remodeling documents. For now, that commitment is the limit of your obligation. This step represents a significant commitment for both of you. Until you sign a construction contract with a remodeling company, you have not made a legal construction commitment.

The remodeler doesn't earn his or her money until you sign a contract and the remodeling project starts. Unless he or she continues to effectively cooperate with you on the design, unless he or she provides a contract price that you can afford, and unless he or she provides the peace of mind and security you require, you will not do the remodeling project. You should expect no less from your remodeler.



Your first priority is to create a team with whom you'll build your dream home. If your team isn't working, you'll recognize it early on. The main sign will involve a lack of progress on your design.

From the beginning of the design process a professional remodeler will provide *price checks* and *value engineering* to help you stay within your preliminary design budget. This term means the remodeling team will keep your budget in mind throughout the design process. With the company's extensive experience in remodeling, it can help "engineer" certain features in your home in a cost effective way. Failure to provide these ideas suggests a remodeler may not be interested in keeping you within budget. You should never feel pressure from your remodeler to expand your budget. Rather, the remodeling team should work to keep construction costs down.

Your communication with both remodeler and architect or designer, should be clear and easy, just as it would when you're talking with a good friend. They should also show a general attention and attentiveness to detail. Design revisions should contain the exact changes you asked for, and the revisions should come back to you within a time frame the remodeler agrees to.

You now have all the information you need to choose an excellent remodeler. The process is a simple one. Ask questions. Keep asking questions until you're satisfied you have what you want. The process could take a week or it could take 6 months. Don't rush the process. Make sure you get answers to all your questions. Your decision will then be an easy one.

# B

## Complete Specifications List

Your actual specifications list will not be as long as the list in this appendix. You will cut and paste to include only those specifications that are relevant to the project you're working on. An example of an actual specifications list done for a family room addition and basement renovation appears in Appendix C.

Date \_\_\_\_\_

### I. General Conditions

- A. Permits, Bonds, Insurance, Warranties
  - 1. Building and other permits and related bonds to be paid by \_\_\_\_\_
  - 2. Homeowner association approvals by owner
  - 3. Builder's risk insurance to be carried and paid for by \_\_\_\_\_
  
- B. Engineering, Architect, Consultants
  - 1. Site engineering including house site, various stakeouts, wall checks, and final survey to be paid for \_\_\_\_\_
  - 2. Architect and blueprint fees to be paid for by \_\_\_\_\_

3. Special engineering problems \_\_\_\_\_
4. Special Consultants \_\_\_\_\_

### C. Utilities

#### 1. Utility Usage Bills

- (a) Temporary electric, telephone, house electric, water, sewer, and gas bills to be paid by \_\_\_\_\_ until such time as house is already for delivery to client, except for punch list items or delays caused by client selections or extras.
- (b) House telephone bill to be paid by client. Remodeler to pay for all long distance calls from company employees or trade contractors.

## II. Lot Improvements (for additions)

### A. Lot Preparation

#### 1. Clearing

- (a) Trees, shrubs and debris will be removed from within the limits of clearing as defined on the final site plan.
- (b) All areas beyond the limits of clearing will remain in as is condition.
- (c) Tree preservation. Master builder group intends of to make every effort to preserve all trees selected for preservation within the limits of clearing. However, in the event any trees do die during or after construction, remodeler is not responsible for their removal. Any trees that must be removed after clearing will be charged as an extra to the client.

#### 2. Dirt Filling or Hauling

- (a) Contract is based on a balanced lot. Filling or hauling of dirt will be done as an extra to the client.

#### 3. Excavation

- (a) To be done per site plan. Dirt will be stored on lot and used in backfill and site grading.
- (b) Rock clause. Contract is based on normal earth condition; if rock, spring water, or any other usual conditions or obstacles are encountered during any required excavation or earth movement work, then all related earth work as well as extra construction will be charged as an extra to the client.
- (c) Earthwork or construction caused by subgrade conditions not indicated on the site plan dated \_\_\_\_\_ will be charged as an extra to the client.

### B. Lot Finishes

1. Driveway: Remodeler shall not be responsible for damage or repair of the driveway unless it is caused by gross negligence.

(a) Includes fine grading, fine gravel, base, and finish.

(b) Material/Description: \_\_\_\_\_  
\_\_\_\_\_

(c) Special driveway notes: \_\_\_\_\_

2. Front Steps and Front (Lead) Walk

(a) Material/Description: \_\_\_\_\_  
\_\_\_\_\_

(b) Size: \_\_\_\_\_  
\_\_\_\_\_

(c) Special stoop/walk notes: \_\_\_\_\_  
\_\_\_\_\_

3. Patio and Patio Steps

(a) Material/Description: \_\_\_\_\_  
\_\_\_\_\_

(b) Size: \_\_\_\_\_  
\_\_\_\_\_

(c) Special project stoop/walk notes: \_\_\_\_\_  
\_\_\_\_\_

4. Deck

(a) Materials.

(1) Structural members: \_\_\_\_\_  
\_\_\_\_\_

(2) Deck surface: \_\_\_\_\_  
\_\_\_\_\_

(3) Handrails: \_\_\_\_\_  
\_\_\_\_\_

(b) Stairs: \_\_\_\_\_  
\_\_\_\_\_

(c) Size/Description: \_\_\_\_\_  
\_\_\_\_\_

(d) Special deck notes: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5. Retaining Walls

(a) Location: \_\_\_\_\_  
\_\_\_\_\_

(b) Size: \_\_\_\_\_  
\_\_\_\_\_

(c) Material/Description: \_\_\_\_\_  
 \_\_\_\_\_

(d) Special retaining wall notes: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

6. Entry Stanchions/Mailbox

(a) Material/Description: \_\_\_\_\_  
 \_\_\_\_\_

(b) Stanchions/Mailbox \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

7. Landscaping

(a) Seed/Sod: All disturbed areas within the limits of clearing will be covered with \_\_\_\_\_ except those areas designated for planting bed.

(b) Plantings: Description \_\_\_\_\_  
 \_\_\_\_\_

(c) Washed out areas will be re-seeded or sodded at the discretion of:  
 \_\_\_\_\_

C. Special Lot Projects: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

### III. House Construction

A. Excavation and Backfill

1. To be done per site plan; dirt will be stored on lot for backfill
2. Rock clause (Section II, 3b)

B. Footings and Foundation Walls

1. Footings

(a) Materials: \_\_\_\_\_  
 \_\_\_\_\_

(b) Length: \_\_\_\_\_  
 \_\_\_\_\_

(c) Width: \_\_\_\_\_  
 \_\_\_\_\_

(d) Depth: \_\_\_\_\_  
 \_\_\_\_\_

2. Foundation Walls

(a) Materials: \_\_\_\_\_  
 \_\_\_\_\_

(b) Height (from top of slab to top of wall): \_\_\_\_\_  
\_\_\_\_\_

(c) Thickness: \_\_\_\_\_  
\_\_\_\_\_

(d) Reinforcements: \_\_\_\_\_  
\_\_\_\_\_

C. Damp Proofing

1. Parging: 3/4-inch waterproof cement applied over exterior or block walls below grade. (Concrete block walls only)

2. Tarring: Liquid bituminous asphalt coating on exterior side of foundation below grade or \_\_\_\_\_  
\_\_\_\_\_

3. Drain Tile.

(a) Interior: \_\_\_\_\_  
\_\_\_\_\_

(b) Exterior drain tile system: \_\_\_\_\_  
\_\_\_\_\_

4. Sump Pump: in crock, draining to exterior

D. Basement Floor

1. Subslab Materials: gravel, poly, wire \_\_\_\_\_  
\_\_\_\_\_

2. Concrete Slab Depth: \_\_\_\_\_  
\_\_\_\_\_

3. Piers and Grade Beams: \_\_\_\_\_  
\_\_\_\_\_

4. Interior Drain Tile: \_\_\_\_\_  
\_\_\_\_\_

5. Sump Crock and Pump: \_\_\_\_\_  
\_\_\_\_\_

E. Steel/Lolly Columns: \_\_\_\_\_  
\_\_\_\_\_

F. Framing

1. Joists: \_\_\_\_\_  
\_\_\_\_\_

2. Wall Construction: \_\_\_\_\_  
\_\_\_\_\_

3. Roof Construction

(a) Structure: \_\_\_\_\_  
\_\_\_\_\_

(b) Plywood: \_\_\_\_\_  
\_\_\_\_\_

## G. Roofing

1. Felt Paper: \_\_\_\_\_  
\_\_\_\_\_
2. Shingles
  - (a) Type: \_\_\_\_\_  
\_\_\_\_\_
  - (b) Guarantee: \_\_\_\_\_  
\_\_\_\_\_
3. Gutters and Downspouts
  - (a) Materials: \_\_\_\_\_  
\_\_\_\_\_
  - (b) Gauge: \_\_\_\_\_  
\_\_\_\_\_
  - (c) Color: \_\_\_\_\_  
\_\_\_\_\_
4. Attic Fans: \_\_\_\_\_  
\_\_\_\_\_
5. Ridge Vent: \_\_\_\_\_  
\_\_\_\_\_

## H. Skylights

1. Location (per plan): \_\_\_\_\_  
\_\_\_\_\_
2. Size (per plan): \_\_\_\_\_  
\_\_\_\_\_
3. Description: \_\_\_\_\_  
\_\_\_\_\_
4. Insulated Flat Glass: \_\_\_\_\_  
\_\_\_\_\_

## I. Exterior Doors and Windows

1. Front Entrance Way
  - (a) Door description: \_\_\_\_\_  
\_\_\_\_\_
  - (b) Jamb description: \_\_\_\_\_  
\_\_\_\_\_
  - (c) Pre-drilled: 2 $\frac{3}{4}$ -inch backset latch and deadbolt
  - (d) Sidelights: \_\_\_\_\_  
\_\_\_\_\_
  - (e) Transom: \_\_\_\_\_  
\_\_\_\_\_
  - (f) Finish: \_\_\_\_\_  
\_\_\_\_\_

2. Garage Entrance Door to House

(a) Size: \_\_\_\_\_  
\_\_\_\_\_

(b) Description: \_\_\_\_\_  
\_\_\_\_\_

3. Location: \_\_\_\_\_

(a) Size: \_\_\_\_\_  
\_\_\_\_\_

(b) Description: \_\_\_\_\_  
\_\_\_\_\_

4. Location: \_\_\_\_\_

(a) Size: \_\_\_\_\_  
\_\_\_\_\_

(b) Description: \_\_\_\_\_  
\_\_\_\_\_

5. Location: Sliding Glass Doors

(a) Size: \_\_\_\_\_  
\_\_\_\_\_

(b) Materials: \_\_\_\_\_  
\_\_\_\_\_

(c) Glass: \_\_\_\_\_  
\_\_\_\_\_

(d) Screens: \_\_\_\_\_  
\_\_\_\_\_

(e) Special: \_\_\_\_\_  
\_\_\_\_\_

6. Garage Doors

(a) Size: \_\_\_\_\_  
\_\_\_\_\_

(b) Style: \_\_\_\_\_  
\_\_\_\_\_

(c) Garage door openers: \_\_\_\_\_  
\_\_\_\_\_

7. Windows Units

(a) Brand: \_\_\_\_\_

(b) Style/Description: \_\_\_\_\_  
\_\_\_\_\_

(c) Glass: \_\_\_\_\_  
\_\_\_\_\_

(d) Size and Type: \_\_\_\_\_  
\_\_\_\_\_



- (e) Grill Styles: \_\_\_\_\_  
 \_\_\_\_\_
- (f) Screens/Standards: \_\_\_\_\_  
 \_\_\_\_\_
- (g) Special: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

## J. Interior stairs

### 1. Location: Main—first to second

- (a) General Description: \_\_\_\_\_  
 \_\_\_\_\_
- (b) Overall width: \_\_\_\_\_  
 \_\_\_\_\_
- (c) Landing(s)—floor finishes: \_\_\_\_\_  
 \_\_\_\_\_
- (d) Construction.
- (1) Left stringer: Open or Closed
  - (2) Right stringer: Open or Closed
  - (3) Treads: \_\_\_\_\_  
 \_\_\_\_\_
  - (4) Risers: \_\_\_\_\_  
 \_\_\_\_\_
  - (5) Nosings: \_\_\_\_\_  
 \_\_\_\_\_
- (e) Finish: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

### 2. Location: Basement to First Floor

- (a) General description: \_\_\_\_\_  
 \_\_\_\_\_
- (b) Overall width: \_\_\_\_\_  
 \_\_\_\_\_
- (c) Landing(s)—Floor Finishes: \_\_\_\_\_  
 \_\_\_\_\_
- (d) Construction
- (1) Left Stringer: Open or Closed
  - (2) Right stringer: Open or Closed
  - (3) Treads: \_\_\_\_\_  
 \_\_\_\_\_
  - (4) Risers: \_\_\_\_\_  
 \_\_\_\_\_

(5) Nosings: \_\_\_\_\_  
\_\_\_\_\_

(e) Finish: \_\_\_\_\_  
\_\_\_\_\_

3. Location

(a) General description: \_\_\_\_\_  
\_\_\_\_\_

(b) Overall width: \_\_\_\_\_  
\_\_\_\_\_

(c) Landing(s)—Floor Finishes: \_\_\_\_\_  
\_\_\_\_\_

(d) Construction.

(1) Left stringer: Open or Closed

(2) Right stringer: Open or Closed

(3) Treads: \_\_\_\_\_  
\_\_\_\_\_

(4) Risers: \_\_\_\_\_  
\_\_\_\_\_

(5) Nosings: \_\_\_\_\_  
\_\_\_\_\_

K. Exterior Wall Surfaces

1. Brick Façade

(a) Location (per plans): \_\_\_\_\_  
\_\_\_\_\_

(b) Selection

(1) Brick: \_\_\_\_\_  
\_\_\_\_\_

(2) Mortar: \_\_\_\_\_  
\_\_\_\_\_

(3) Joint Style: \_\_\_\_\_  
\_\_\_\_\_

2. Stone Façade

(a) Location (per plans): \_\_\_\_\_  
\_\_\_\_\_

(b) Selection

(1) Stone: \_\_\_\_\_  
\_\_\_\_\_

(2) Installation: \_\_\_\_\_  
\_\_\_\_\_

3. Siding

(a) Locations (per plan): \_\_\_\_\_  
\_\_\_\_\_

(b) Materials: \_\_\_\_\_  
\_\_\_\_\_

4. Cornice Materials: \_\_\_\_\_  
\_\_\_\_\_

5. Special Exterior Details: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

#### L. Fireplace Construction

1. Type: \_\_\_\_\_  
\_\_\_\_\_

2. Location: \_\_\_\_\_  
\_\_\_\_\_

#### M. Interior Plumbing System

##### 1. In-House Piping

(a) Water Supply: \_\_\_\_\_  
\_\_\_\_\_

(b) Waste Water: \_\_\_\_\_  
\_\_\_\_\_

(c) Gas: \_\_\_\_\_  
\_\_\_\_\_

##### 2. Water Heater

(a) Capacity: \_\_\_\_\_  
\_\_\_\_\_

(b) Heat Source: \_\_\_\_\_

##### 3. Kitchen

(a) \_\_\_\_\_ sink(s),  
\_\_\_\_\_ dishwasher(s) and  
\_\_\_\_\_ disposal connections.

(b) Ice maker water line: \_\_\_\_\_

(c) Gas piping for cook top: \_\_\_\_\_

##### 4. Laundry Room

(a) Washer connection: \_\_\_\_\_

(b) Gas dryer (if applicable): \_\_\_\_\_

(c) Laundry sink: \_\_\_\_\_

5. Basement Bath Rough-In: \_\_\_\_\_  
\_\_\_\_\_

##### 6. Bar(s)

(a) Location(s): \_\_\_\_\_  
\_\_\_\_\_

(1) Bar sink(s): \_\_\_\_\_  
\_\_\_\_\_

(2) Other: \_\_\_\_\_  
\_\_\_\_\_

7. Bathrooms and Powder Room (see specifications for each location in Section IV, Finishes)

8. Exterior Hose Bibs

(a) Quantity: \_\_\_\_\_  
\_\_\_\_\_

(b) Location(s): \_\_\_\_\_  
\_\_\_\_\_

9. Water Meter and Service: \_\_\_\_\_  
\_\_\_\_\_

10. Special Interior Plumbing: \_\_\_\_\_  
\_\_\_\_\_

N. Heating, Venting and Air Conditioning System (HVAC)

1. Heating and Cooling Equipment, Zone 1 System

(a) Heating plant

(1) Energy source: \_\_\_\_\_  
\_\_\_\_\_

(2) Unit description: \_\_\_\_\_  
\_\_\_\_\_

(3) BTUs sized for house: \_\_\_\_\_  
\_\_\_\_\_

(4) Unit location ( per plans): \_\_\_\_\_  
\_\_\_\_\_

(b) Cooling plant

(1) Energy source: \_\_\_\_\_  
\_\_\_\_\_

(2) Unit description: \_\_\_\_\_  
\_\_\_\_\_

(3) Tonnage: \_\_\_\_\_  
\_\_\_\_\_

(4) Unit location: \_\_\_\_\_  
\_\_\_\_\_

(c) Distribution: \_\_\_\_\_  
\_\_\_\_\_

(d) Registers: location and number: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- (e) Humidifier: \_\_\_\_\_  
 \_\_\_\_\_
- (f) Air cleaner: \_\_\_\_\_  
 \_\_\_\_\_
- (g) Dryer Vent: vented to outside.
- (h) Bath fans: included for each toilet location.
- (i) Attic fans: \_\_\_\_\_  
 \_\_\_\_\_
- (j) Laundry chute: \_\_\_\_\_
2. HVAC specialty items: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

#### O. Electrical Wiring System

1. Amperage: \_\_\_\_\_
2. Panel(s)
- (a) Location(s): \_\_\_\_\_  
 \_\_\_\_\_
- (b) Description: \_\_\_\_\_  
 \_\_\_\_\_
3. Wiring: All insulated Copper
4. Receptacles
- (a) Duplex, grounded outlets.
- (b) Quantity (per plan): \_\_\_\_\_
- (c) GFCI outlets (as required per electric code): \_\_\_\_\_  
 \_\_\_\_\_
- (d) Exterior waterproof outlets (quantity per plan): \_\_\_\_\_  
 \_\_\_\_\_
5. Switches
- (a) Locations (per plan)
- (b) Quantity (per plan)
- (c) Switches: \_\_\_\_\_  
 \_\_\_\_\_
- (d) Color: \_\_\_\_\_
- (e) Cover Plates: \_\_\_\_\_
6. Fixtures (allowance) \$ \_\_\_\_\_
- (a) Locations (per plan)
- (b) Interior and exterior surface-mounted fixtures
- (1) Allowance budget includes—
- Hanging fixtures
  - Doorbell chime
  - Miscellaneous interior fixtures

- Exterior lights
- Light bulbs, tax, delivery charges
- Recessed fixtures

(2) Exterior flood lights: \_\_\_\_\_  
 \_\_\_\_\_

(3) Fixtures that are difficult to install may require extra labor charge. Notice will be provided prior to any additional labor charge.

(c) Recessed fixtures: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Description	Housing	Trim
1. _____	1. _____	1. _____
2. _____	2. _____	2. _____
3. _____	3. _____	3. _____

7. Interior and exterior fixture chart

Location	Quantity	Comments	Selections
Front door: _____			
Foyer: _____			
1st fl. hall: _____			
Dining room: _____			
Living room: _____			
Family room: _____			
2nd fl. hall: _____			
Master bedroom: _____			
Master bathroom: _____			
Other bedroom: _____			
Other bedroom: _____			
Other bathroom: _____			

Other bathroom: \_\_\_\_\_

Powder room: \_\_\_\_\_

Closets \_\_\_\_\_

Laundry room: \_\_\_\_\_

8. Other pre-wired systems

(a) Telephone.

(1) Number of jack locations: \_\_\_\_\_

(2) Number of phone lines required: \_\_\_\_\_

(3) Telephones not included: \_\_\_\_\_

(b) Television

(1) Single coaxial cable run from wall receptacle locations to a common attic location.

(2) Number of locations: \_\_\_\_\_

(3) Antenna installed by: \_\_\_\_\_

(c) Smoke detectors

(1) Quantity (as required by code)

(2) Type: Electric

(3) Locations: \_\_\_\_\_

(d) Security system

(1) Rough-in: \_\_\_\_\_

(2) Complete system: \_\_\_\_\_

(e) Entry door chime

(1) Button location: \_\_\_\_\_

(2) Chime location: \_\_\_\_\_

(f) Sound system

(1) Sound system description and location: \_\_\_\_\_

(g) Central vacuum system

(1) System designed and installed by central vacuum specialist:

\_\_\_\_\_  
\_\_\_\_\_

9. Smart House®: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

10. Electrical Specialty Items: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

P. Insulation

1. Exterior walls—R-value: \_\_\_\_\_

(a) Batt insulation: \_\_\_\_\_

(b) Sheathing: \_\_\_\_\_

2. Attic ceiling—R value : \_\_\_\_\_

(a) Batt insulation: \_\_\_\_\_

(b) Blown: \_\_\_\_\_

3. Garage ceiling—R-value: \_\_\_\_\_

4. Vaulted ceiling—R-Value: \_\_\_\_\_

5. Basement: \_\_\_\_\_

6. Air-seal system: \_\_\_\_\_

7. Special insulation situations: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Q. Drywall

1. Normal conditions: ½-inch gypsum board

2. Type \_\_\_\_\_ drywall: installed in garage and other code-required situations

3. Water resistant: installed in tub and shower surrounds unless otherwise noted

4. Wonder board or equal: \_\_\_\_\_

\_\_\_\_\_

**IV. FINISHES**

A. Flooring

1. Flooring schedule

(a) Foyers: \_\_\_\_\_

\_\_\_\_\_



- (b) Living room: \_\_\_\_\_  
\_\_\_\_\_
- (c) Dining room: \_\_\_\_\_  
\_\_\_\_\_
- (d) Family room: \_\_\_\_\_  
\_\_\_\_\_
- (e) Powder room and first room hall: \_\_\_\_\_  
\_\_\_\_\_
- (f) Kitchen: \_\_\_\_\_  
\_\_\_\_\_
- (g) Second floor hallway: \_\_\_\_\_  
\_\_\_\_\_
- (h) Master bedroom: \_\_\_\_\_  
\_\_\_\_\_
- (i) Breakfast room: \_\_\_\_\_  
\_\_\_\_\_
- (j) Other bedrooms: \_\_\_\_\_  
\_\_\_\_\_
- (k) Stairs: \_\_\_\_\_  
\_\_\_\_\_
- (l) Laundry room: \_\_\_\_\_  
\_\_\_\_\_

## 2. Marble/ceramic tile

- (a) Standards include
- (1) All bath tiles set on wonder board underlayment.
  - (2) Installation of wall tile shall be on green board.
- (b) Selection chart: ceramic tile (Please see section C-3, ceramic tile).

## 3. Carpet: allowance: \$ \_\_\_\_\_

- (a) Allowance based on rooms listed above.
- (b) Includes carpet, pad, installation, tax, and any other related charge.
- (c) Pad and carpet installed directly over sub floor.
- (d) Client to make selections directly with carpet contractor.
- (1) Carpet contractor to warrant material and installation directly to client.
  - (2) Carpet contractor to meet remodeler's construction schedule, to cooperate with him or her on the job, and to remove their trash from the house.
  - (3) Carpet contractor is responsible for damage caused by his or her workers to the house.
- (e) Carpet contractor
- (1) Company: \_\_\_\_\_

- (2) Telephone: \_\_\_\_\_
- (3) Person to contact: \_\_\_\_\_
- (f) Selection Chart (See Section A-I):
  - (2) Location(s): \_\_\_\_\_
  - \_\_\_\_\_
  - \_\_\_\_\_
  - (3) Color: \_\_\_\_\_
  - \_\_\_\_\_
  - \_\_\_\_\_
  - (4) Pad: \_\_\_\_\_
  - \_\_\_\_\_
  - \_\_\_\_\_

4. Vinyl/Resilient Flooring (allowance) \$ \_\_\_\_\_

- (a) Standards include: underlayment provided and installed by subcontractor.
- (b) Selection chart: vinyl
  - (1) Location(s) \_\_\_\_\_
  - \_\_\_\_\_
  - \_\_\_\_\_
  - (2) Tile: \_\_\_\_\_
  - \_\_\_\_\_
  - \_\_\_\_\_
  - (3) Installation by: \_\_\_\_\_
  - \_\_\_\_\_
  - \_\_\_\_\_
  - \_\_\_\_\_

B. Kitchen Finishes

1. Appliances

- (a) Range, manufacturer and model: \_\_\_\_\_
- \_\_\_\_\_
- (1) Energy source: \_\_\_\_\_
- (2) Size limitation: \_\_\_\_\_
- (3) Venting: \_\_\_\_\_
- (b) Cook top, manufacturer and model: \_\_\_\_\_
- \_\_\_\_\_
- (1) Size: \_\_\_\_\_
- (2) Energy source: \_\_\_\_\_
- (3) Venting: \_\_\_\_\_
- (c) Range, cook top ventilation, manufacturer and model: \_\_\_\_\_
- \_\_\_\_\_

- (1) Size: \_\_\_\_\_  
(2) Type: \_\_\_\_\_  
(3) Finish: \_\_\_\_\_
- (d) Wall ovens, manufacturer and model \_\_\_\_\_  
\_\_\_\_\_  
(1) Energy source: \_\_\_\_\_  
(2) Size limitation: \_\_\_\_\_  
(3) Venting: \_\_\_\_\_
- (e) Refrigerator, manufacturer and model: \_\_\_\_\_  
\_\_\_\_\_  
(1) Size limitation: \_\_\_\_\_  
(2) Ice hookup: \_\_\_\_\_  
(3) Finish: \_\_\_\_\_
- (f) Dishwasher, manufacturer and model: \_\_\_\_\_  
\_\_\_\_\_  
(1) Size: \_\_\_\_\_  
(2) Finish: \_\_\_\_\_
- (g) Garbage disposal, manufacturer and model: \_\_\_\_\_  
\_\_\_\_\_
- (h) Microwave, manufacturer and model: \_\_\_\_\_  
\_\_\_\_\_
- (i) Size: \_\_\_\_\_  
(j) Other: \_\_\_\_\_  
\_\_\_\_\_
2. Kitchen cabinetry
- (a) Layout: see enclosed plan dated: \_\_\_\_\_  
(b) Style and Description: \_\_\_\_\_  
\_\_\_\_\_  
(c) Finish: \_\_\_\_\_  
(d) Hardware: \_\_\_\_\_  
(e) Special details: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
3. Kitchen countertops
- (a) Materials: \_\_\_\_\_  
(b) Color: \_\_\_\_\_  
(c) Backsplash: \_\_\_\_\_  
(d) Special details: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

4. Kitchen sink(s)

- (a) Manufacturer and model: \_\_\_\_\_
- (b) Single bowl or double bowl: \_\_\_\_\_
- (c) Size: \_\_\_\_\_
- (d) Finish: \_\_\_\_\_

5. Kitchen sink faucet(s)

- (a) Manufacturer and model: \_\_\_\_\_
- (b) Finish: \_\_\_\_\_

C. Bathrooms: Master Bath

1. Vanity

(a) Vanity Cabinets

- (1) Layout: \_\_\_\_\_
- (2) Style/material: \_\_\_\_\_
- (3) Color or finish: \_\_\_\_\_
- (4) Hardware: \_\_\_\_\_

(b) Vanity top

- (1) Materials: \_\_\_\_\_
- (2) Color: \_\_\_\_\_

(c) Bowl

- (1) Manufacturer and model: \_\_\_\_\_
- (2) Color: \_\_\_\_\_
- (3) Faucet hole spacing (4" or 8"): \_\_\_\_\_

(d) Faucet(s)

- (1) Manufacturer and model: \_\_\_\_\_
- (2) Finish: \_\_\_\_\_

2. Plumbing fixtures

(a) Bath tub

- (1) Manufacturer and model: \_\_\_\_\_
- (2) Color: \_\_\_\_\_

(b) Bath tub faucet

- (1) Manufacturer and model: \_\_\_\_\_
- (2) Finish: \_\_\_\_\_

(c) Toilet

- (1) Manufacturer and model: \_\_\_\_\_
- (2) Color: \_\_\_\_\_

- (3) Lever finish: \_\_\_\_\_
- (d) Shower pan: \_\_\_\_\_
- (e) Shower faucet
  - (1) Manufacturer and model: \_\_\_\_\_  
\_\_\_\_\_
  - (2) Finish: \_\_\_\_\_
  - (3) Special shower features: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

#### D. Bathrooms: Hall Bath

##### 1. Vanity

- (a) Vanity Cabinets
  - (1) Layout: \_\_\_\_\_  
\_\_\_\_\_
  - (2) Style and material: \_\_\_\_\_
  - (3) Color finish: \_\_\_\_\_
  - (4) Hardware: \_\_\_\_\_
- (b) Vanity Top
  - (1) Materials: \_\_\_\_\_
  - (2) Color: \_\_\_\_\_
- (c) Bowl
  - (1) Manufacturer and model: \_\_\_\_\_  
\_\_\_\_\_
  - (2) Color: \_\_\_\_\_
  - (3) Faucet hole spacing (4" or 8"): \_\_\_\_\_
- (d) Faucet(s)
  - (1) Manufacturer and model: \_\_\_\_\_  
\_\_\_\_\_
  - (2) Finish: \_\_\_\_\_

##### 2. Plumbing Fixtures

- (a) Bath Tub
  - (1) Manufacturer and model: \_\_\_\_\_  
\_\_\_\_\_
  - (2) Color: \_\_\_\_\_
- (b) Bath tub faucet
  - (1) Manufacturer and model: \_\_\_\_\_  
\_\_\_\_\_
  - (2) Finish: \_\_\_\_\_

(c) Toilet

(1) Manufacturer and model:

\_\_\_\_\_

(2) Color: \_\_\_\_\_

(3) Lever finish: \_\_\_\_\_

(d) Shower pan: \_\_\_\_\_

(e) Shower faucet

(1) Manufacturer and model: \_\_\_\_\_

\_\_\_\_\_

(2) Finish: \_\_\_\_\_

(3) Special shower features: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

E. Bathrooms: Basement

1. Vanity

(a) Vanity cabinets

(1) Layout: \_\_\_\_\_

\_\_\_\_\_

(2) Style and material \_\_\_\_\_

(3) Color finish: \_\_\_\_\_

(4) Hardware: \_\_\_\_\_

(b) Vanity top

(1) Materials: \_\_\_\_\_

(2) Color: \_\_\_\_\_

(c) Bowl

(1) Manufacturer and model: \_\_\_\_\_

\_\_\_\_\_

(2) Color: \_\_\_\_\_

(3) Faucet hole spacing (4" or 8"): \_\_\_\_\_

(d) Faucet(s)

(1) Manufacturer and model: \_\_\_\_\_

\_\_\_\_\_

(2) Finish: \_\_\_\_\_

2. Plumbing fixtures

(a) Bath tub

(1) Manufacturer/Model: \_\_\_\_\_

\_\_\_\_\_

(2) Color: \_\_\_\_\_

- (b) Bath tub faucet  
 (1) Manufacturer and model: \_\_\_\_\_  
 \_\_\_\_\_  
 (2) Finish: \_\_\_\_\_
- (c) Toilet  
 (1) Manufacturer and model: \_\_\_\_\_  
 \_\_\_\_\_  
 (2) Color: \_\_\_\_\_  
 (3) Lever finish: \_\_\_\_\_
- (d) Shower pan: \_\_\_\_\_
- (e) Shower faucet  
 (1) Manufacturer and model: \_\_\_\_\_  
 \_\_\_\_\_  
 (2) Finish: \_\_\_\_\_  
 (3) Special shower features: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

F. Bathrooms (additional locations): \_\_\_\_\_

1. Vanity

- (a) Vanity Cabinets  
 (1) Layout \_\_\_\_\_  
 (2) Style and material: \_\_\_\_\_  
 (3) Color finish: \_\_\_\_\_  
 (4) Hardware: \_\_\_\_\_
- (b) Vanity top  
 (1) Materials: \_\_\_\_\_  
 (2) Color: \_\_\_\_\_
- (c) Bowl  
 (1) Manufacturer and model: \_\_\_\_\_  
 \_\_\_\_\_  
 (2) Color: \_\_\_\_\_  
 (3) Faucet hole spacing (4" or 8"): \_\_\_\_\_
- (d) Faucet(s)  
 (1) Manufacturer and model: \_\_\_\_\_  
 \_\_\_\_\_  
 (2) Finish: \_\_\_\_\_

2. Plumbing Fixtures

- (a) Bath Tub  
 (1) Manufacturer and model: \_\_\_\_\_  
 \_\_\_\_\_  
 (2) Color: \_\_\_\_\_

- (b) Bath tub faucet
  - (1) Manufacturer and model: \_\_\_\_\_  
\_\_\_\_\_
  - (2) Finish: \_\_\_\_\_
- (c) Toilet
  - (1) Manufacturer and model: \_\_\_\_\_  
\_\_\_\_\_
  - (2) Color: \_\_\_\_\_
  - (3) Lever finish: \_\_\_\_\_
- (d) Shower Pan: \_\_\_\_\_
- (e) Shower Faucet
  - (1) Manufacturer and model: \_\_\_\_\_  
\_\_\_\_\_
  - (2) Finish: \_\_\_\_\_
  - (3) Special shower features: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. Ceramic tile

- (a) Master bath
  - (1) Floor: \_\_\_\_\_
  - (2) Walls: \_\_\_\_\_
  - (3) Product: \_\_\_\_\_
  - (4) Color: \_\_\_\_\_
  - (5) Grout: \_\_\_\_\_
- (b) Hall bath
  - (1) Floor: \_\_\_\_\_
  - (2) Walls: \_\_\_\_\_
  - (3) Product: \_\_\_\_\_
  - (4) Tile color: \_\_\_\_\_
  - (5) Grout: \_\_\_\_\_
- (c) Bath# \_\_\_\_\_
  - (1) Floor: \_\_\_\_\_
  - (2) Walls: \_\_\_\_\_
  - (3) Product: \_\_\_\_\_
  - (4) Tile color: \_\_\_\_\_
  - (5) Grout: \_\_\_\_\_
- (d) Powder room
  - (1) Floor: \_\_\_\_\_
  - (2) Walls: \_\_\_\_\_
  - (3) Product: \_\_\_\_\_



- (4) Tile: \_\_\_\_\_
  - (5) Grout: \_\_\_\_\_
  - (e) Base. bath
    - (1) Floor: \_\_\_\_\_
    - (2) Walls: \_\_\_\_\_
    - (3) Product: \_\_\_\_\_
    - (4) Tile: \_\_\_\_\_
    - (5) Grout: \_\_\_\_\_
  - (f) Special ceramic tile
    - (1) Floor: \_\_\_\_\_
    - (2) Walls: \_\_\_\_\_
    - (3) Product: \_\_\_\_\_
    - (4) Tile: \_\_\_\_\_
    - (5) Grout: \_\_\_\_\_
4. Bathroom mirrors
- (a) Master bath
    - (1) Location: \_\_\_\_\_
    - (2) Approximate size: \_\_\_\_\_
    - (3) Special Instructions: \_\_\_\_\_
  - (b) Hall bath
    - (1) Location: \_\_\_\_\_
    - (2) Approximate size: \_\_\_\_\_
    - (3) Special instructions: \_\_\_\_\_
  - (c) Bath # \_\_\_\_\_
    - (1) Location: \_\_\_\_\_
    - (2) Approximate size: \_\_\_\_\_
    - (3) Special instructions: \_\_\_\_\_
  - (d) Powder room
    - (1) Location: \_\_\_\_\_
    - (2) Approximate size: \_\_\_\_\_
    - (3) Special instructions: \_\_\_\_\_
  - (e) Basement bath
    - (1) Location: \_\_\_\_\_
    - (2) Approximate size: \_\_\_\_\_
    - (3) Special instructions: \_\_\_\_\_
5. Master bathroom
- (a) Medicine cabinets
    - (1) Manufacturer and model: \_\_\_\_\_  
\_\_\_\_\_
    - (2) Quantity: \_\_\_\_\_

(3) Rough opening in wall: \_\_\_\_\_  
\_\_\_\_\_

will install bath accessories furnished by the owner.

6. Hall bath

(a) Medicine cabinets

(1) Manufacturer and model: \_\_\_\_\_  
\_\_\_\_\_

(2) Quantity: \_\_\_\_\_

(3) Rough opening in wall: \_\_\_\_\_  
\_\_\_\_\_

will install bath accessories furnished by the owner.

7. Powder Room

(a) Medicine cabinets

(1) Manufacturer and model: \_\_\_\_\_  
\_\_\_\_\_

(2) Quantity: \_\_\_\_\_

(3) Rough opening in wall: \_\_\_\_\_  
\_\_\_\_\_

will install bath accessories furnished by the owner.

G. Interior Doors and Trim

1. Interior Doors

(a) Style: \_\_\_\_\_

(b) Sizes, swings: (per plan)

(c) Special Doors: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

H. Trim Chart

Location	Base	Casing	Crown	Chair	Special
Foyers:	_____	_____	_____	_____	_____
Living Room:	_____	_____	_____	_____	_____
Dining Room:	_____	_____	_____	_____	_____
Family Room:	_____	_____	_____	_____	_____
Powder Room:	_____	_____	_____	_____	_____
First Room Hall:	_____	_____	_____	_____	_____
Kitchen	_____	_____	_____	_____	_____
Sec. Fl. Hallway:	_____	_____	_____	_____	_____
Master Bedroom:	_____	_____	_____	_____	_____
Breakfast room:	_____	_____	_____	_____	_____
Other Bedrooms:	_____	_____	_____	_____	_____
Stairs:	_____	_____	_____	_____	_____

Laundry Room: \_\_\_\_\_

(a) Special trim

(1) Library: \_\_\_\_\_

\_\_\_\_\_

(2) Built-ins: \_\_\_\_\_

\_\_\_\_\_

## I. Handrail Systems

### 1. Location: Main

(a) General description: \_\_\_\_\_

\_\_\_\_\_

(b) Handrail: \_\_\_\_\_

\_\_\_\_\_

(c) Newel posts: \_\_\_\_\_

\_\_\_\_\_

(d) Balusters: \_\_\_\_\_

\_\_\_\_\_

(e) Finish: \_\_\_\_\_

\_\_\_\_\_

### 2. Location: Basement

(a) General description: \_\_\_\_\_

\_\_\_\_\_

(b) Handrail: \_\_\_\_\_

\_\_\_\_\_

(c) Newel posts: \_\_\_\_\_

\_\_\_\_\_

(d) Balusters: \_\_\_\_\_

\_\_\_\_\_

(e) Finish: \_\_\_\_\_

\_\_\_\_\_

## J. Fireplace facades

### 1. Location: \_\_\_\_\_

(a) Opening size: \_\_\_\_\_

(b) Facade description: \_\_\_\_\_

(c) Hearth description: \_\_\_\_\_

### 2. Location: \_\_\_\_\_

(a) Opening size: \_\_\_\_\_

(b) Facade description: \_\_\_\_\_

(c) Hearth description: \_\_\_\_\_

### 3. Location: \_\_\_\_\_

- (a) Opening size: \_\_\_\_\_
- (b) Facade description: \_\_\_\_\_
- (c) Hearth description: \_\_\_\_\_

K. Exterior painting

1. All exterior soffits, windows, trim, siding (if applicable), and doors (except clad material) are painted with one coat primer and \_\_\_ coats of: \_\_\_\_\_
  - (a) Manufacturer and type: \_\_\_\_\_
  - (b) Color(s): \_\_\_\_\_
2. Front Entrance Way: \_\_\_\_\_
3. Treated lumber (decks) are left natural because the characteristics of the lumber
4. Special: \_\_\_\_\_

L. Interior paint/stain

1. Standards include
  - (a) Manufacturer: \_\_\_\_\_
  - (b) Walls and ceilings: \_\_\_\_\_
  - (c) Painted trim and doors: \_\_\_\_\_
  - (d) Stained trim and doors: stain and varnish, polyurethane (satin finish): \_\_\_\_\_
  - (e) Kitchen work areas and bathrooms: \_\_\_\_\_
  - (f) Mixed Colors and custom painting will be priced out as extras.

M. Finish hardware

1. Exterior door locks and hardware
  - (a) Front entrance
    - (1) Type: handle set
    - (2) Handle set—Manufacturer and model: \_\_\_\_\_

- (3) Slide bolts: \_\_\_\_\_
- (4) Dead bolts: \_\_\_\_\_
- (5) Finish: \_\_\_\_\_
- (6) Pre-drilled bore: \_\_\_\_\_
- (b) Garage Door to House
- (1) Type: \_\_\_\_\_
- (2) Manufacturer and model: \_\_\_\_\_
- \_\_\_\_\_
- (3) Slide bolts: \_\_\_\_\_
- (4) Dead bolts: \_\_\_\_\_
- (5) Finish: \_\_\_\_\_
- (6) Pre-drilled bore: \_\_\_\_\_
- (c) Location:
- (1) Type door: \_\_\_\_\_
- (2) Manufacturer and model: \_\_\_\_\_
- (3) Slide bolt: \_\_\_\_\_
- (4) Dead bolt: \_\_\_\_\_
- (5) Finish: \_\_\_\_\_
- (6) Pre-drilled bore: \_\_\_\_\_
2. Interior door locks
- (a) Manufacturer and model: \_\_\_\_\_
- \_\_\_\_\_
- (b) Privacy Locks
- (1) Bedroom entrances: \_\_\_\_\_
- (2) First floor to basement: \_\_\_\_\_
- (3) Powder room: \_\_\_\_\_
- (4) Quantity: per plans
- (c) Bathroom Locks
- (1) All baths: brass color outside, chrome color inside
- (2) Quantity: Per plans
- (d) Passage
- (1) Closets and Laundry Room
- (e) Dummy Knobs (with ball catches)
- (1) Non-locking, knobs on one side of door only
- (2) Use on double doors, on closets and pantry doors: Brass with clear finish
- (f) Special interior door hardware: \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
3. Miscellaneous hardware
- (a) Closet poles: wood
- (b) Coat hooks: not included

(c) Door stops: spring type

(d) Misc. hardware: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

4. Special mirrors/glass shelves: \_\_\_\_\_

\_\_\_\_\_

N. Laundry room

1. Cabinetry

(a) Layout: \_\_\_\_\_

(b) Description: \_\_\_\_\_

(c) Color/finish: \_\_\_\_\_

2. Cabinet top

(a) Material: \_\_\_\_\_

(b) Color: \_\_\_\_\_

3. Laundry tub

(a) Manufacturer and model: \_\_\_\_\_

\_\_\_\_\_

(b) Color: white

(c) Faucet hole spacing: \_\_\_\_\_

O. Special projects: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

# Sample Specifications Index

This is a specifications list that was done for a family room addition and basement renovation. Disclaimer: Brands, trade names, and model numbers in the sample serve only as examples- they are not intended as endorsements.

Date \_\_\_\_\_

## I. General Conditions

- A. Permits, Bonds, Insurance, Warranties
  - 1. Building and other permits and related bonds to be paid by Master Builder Group Inc.
  - 2. Local area permits and approvals by Master Builder Group Inc.
  - 3. Builders' risk insurance to be carried and paid for by Master Builder Group Inc.

## II. Lot Preparations

- A. Lot Preparation
  - 1. Clearing
    - (a) Trees, shrubs and debris will be removed from within the limits of clearing as defined on the final site plan.

- (b) All areas beyond the limits of clearing will remain in as is condition.
  - (c) Tree preservation: It is the intention of Master Builder Group Inc. to make every effort to preserve all trees selected for preservation within the limits of clearing. However in the event any trees do die during or after construction, Master Builder Group Inc. is not responsible for their removal. Any trees which must be removed after clearing will be charged as an extra to the client. (Note: Tree near addition may be lost.)
2. Dirt filling or hauling N/A
    - (a) Contract is based on a balanced lot- filling or hauling of dirt will be done as an extra to the client.
  3. Excavation
    - (a) To be done per site plan; dirt will be stored on lot and used in backfill and site grading.
    - (b) Rock clause; contract is based on normal earth conditions; if rock, spring water, or any unusual conditions or obstacles are encountered during any required excavation work or earth movement work, all related earth work as well as extra construction will be charged as an extra to the client.
    - (c) Earthwork or construction caused by subgrade conditions not indicated on the site plan dated June 2000 will be charged as an extra to the client
- B. Lot finishes
1. Driveway:
 

**Master Builders Group Inc. shall not be responsible for damage to the driveway unless it is caused by gross negligence.**

    - (a) Includes fine grading, fine gravel, base and finish.
    - (b) Material/description: **Asphalt**
    - (c) Special driveway notes: **Re-asphalt driveway allowance \$1,200**
  2. Patio and patio steps:
    - (a) Material/description: **Pressure-treated lumber**
    - (b) Size: **per plans**
    - (c) Special stoop/walk notes: **N/A**
  3. Retaining walls
    - (a) Location: **per plans**  
Size: **per plans**  
Material/description: **per plans**  
**Brick and CMU retaining wall with rowlock cap.**
    - (b) Special retaining wall notes: **Vertical and horizontal reinforcing 16" O.C.**



4. Landscaping
  - (a) Washed-out areas will be re-seeded or sodded at the discretion of Master Builder Group Inc.

### III. House Construction

- A. Excavation & Backfill
  1. To be done per site plan, dirt will be stored on lot for backfill.
  2. Rock Clause.
- B. Footing and foundation walls
  1. Footings: **Per plans**
    - (a) Materials: **Concrete**
    - (b) Length: **Per plans**
    - (c) Width: **Per plans**
    - (d) Depth: **Per plans**
  2. Foundation walls
    - (a) Materials: **CMU Block**
    - (b) Height (from top of slab to top of wall): **Per plans**
    - (c) Thickness: **8"**
    - (d) Reinforcements: **Per plans**
- C. Damp proofing
  1. Parging: ( **$\frac{3}{4}$ -inch waterproof cement applied over exterior block walls below grade. [CMU walls only]**).
  2. Tarring: **Liquid bituminous asphalt coating on exterior side of foundation below grade.**
  3. Drain tile: **Per plans**
- D. Brick exterior walls: **Basement stairwell per plans**
- E. Framing
  1. Joists: **2 × 8**
  2. Plywood decking:  **$\frac{3}{4}$ " T&G**
  3. Wall construction: **2 × 4**
  4. Roof construction
    - (a) Structure: **trusses and hand-framed sections per plan**
    - (b) Plywood:  **$\frac{1}{2}$  CDX**
- F. Roofing
  1. Felt paper: **15 lb.**
  2. Shingles: **CertainTeed**
    - (a) Type: **fiberglass XT25**
    - (b) Guarantee: **25 years**

3. Gutters and down spouts
  - (a) Materials: **5" seamless aluminum; 032 guage**
  - (b) Color: **White**
4. Ridge vent: **Yes**

#### G. Skylights

1. Location: **Per plan**
2. Size: **Per plan**
3. Description: **Velux FS106**

#### H. Exterior doors and windows

1. Front entrance way
  - (a) Door description: **TBD/Homeowner allowance \$750**
  - (b) Jamb description:
  - (c) Pre-drilled:
  - (d) Sidelights:
  - (e) Transom:
  - (f) Finish:
2. Location: Off family room
  - (a) Size: **12'0" × 6'8" Andersen sliding glass door**
  - (b) Materials: **Wood/vinyl clad**
  - (c) Glass: **Insulated**
  - (d) Screens: **Yes**
3. Location: **Off breakfast area, Andersen sliding glass door**
  - (a) Size: **6'0" × 6'8"**
  - (b) Materials: **Wood/vinyl clad**
  - (c) Glass: **Insulated**
  - (d) Screens: **Yes**
4. Window units
  - (a) Brand: **Andersen**
  - (b) Style/description: **Double hung**
  - (c) Glass: **insulated**
  - (d) Size and type: **Per plans**
  - (e) Grill styles: **Prairie grills/special order**
  - (f) Screens/standards: **Yes**
  - (g) Special: **Trimline double hung, clad wood windows, (7) plus (7) sets of Prairie grills and low "E" glass.**

#### I. Exterior wall surfaces

1. Brick facade
  - (a) Location per plans: **basement stairway**
  - (b) Selection: **to match existing**

- (1) Brick
  - (2) Mortar
  2. Siding: **Norandex .44 guage**
    - (a) Locations: **per plan**
    - (b) Materials: **Vinyl**
- J. Exterior Painting
1. Prime all exterior soffits, windows, trim, doors (except clad material), and **one (1)** coat of **Exterior Alkyd**.
    - (a) Manufacturer and type: **Glidden/Duron or equal**
    - (b) Color(s): **per homeowner**
  2. Front entrance way: **per homeowner**
  3. Treated lumber (decks) are left natural due to the characteristics of the lumber.
- K. Heating, venting & air conditioning system (HVAC)
1. Heating and cooling equipment
    - (a) Heating plant
      - (1) Energy source: **Existing**
    - (b) Cooling plant
      - (1) Energy source: **Electrical**
        - (a) Unit description: **Carrier**
        - (b) Tonnage: **2½ ton**
        - (c) Unit location: **Existing location**
      - (2) Distribution: **Per plans**
      - (3) Registers: locations and numbers: **Per plans**
      - (4) Humidifier: **Optional**
      - (5) Air cleaner: **Optional**
      - (6) Dryer vent: vented to outside: **hookup to appliance not included**
      - (7) Bathroom fans: **Included for each toilet location**
      - (8) Attic fans: **See roofing section III. 1**
- L. Electrical wiring system
1. Amperage: **200 (200 minimum heavy up)**
  2. Panel(s): **One**
    - (a) Location: **Existing**
    - (b) Description: **Electrical contractor will increase panel size**
  3. Wiring: **All insulated copper**
  4. Receptacles
    - (a) Duplex, grounded: **Outlets**
    - (b) Quantity: **As per plan**

- (c) G.F.I.: **Outlets/as required per electric Code**
- (d) Exterior waterproof outlets: **As per plan**
- 5. Switches
  - (a) Locations: **Per plan**
  - (b) Quantity: **Per plan**
  - (c) Switch Type: **Silent toggle**
  - (d) Color: **Ivory**
  - (e) Cover plates: **Metal–Ivory**
- 6. Fixtures: **Allowance \$1,400**
  - (a) Locations per plan
  - (b) Interior and exterior surface mounted fixtures
    - (1) Allowance budget includes all:
      - Hanging fixtures
      - Doorbell chime
      - Miscellaneous interior fixtures
      - Exterior lights
      - Light bulbs, tax, delivery charges
      - Recessed fixtures
    - (2) Exterior flood lights
    - (3) Master Builder Group Inc. is to provide client with fixture chart after rough-in is completed.
- 7. Other pre-wired systems
  - (a) Telephone pre-wire: **Allowance \$500**
    - (1) Number of jack locations: **per plan**
    - (2) Number of phone lines required: **2**
  - (b) Television pre-wire: **Allowance \$200**
    - (1) Single coaxial cable run from wall receptacle locations to a common attic location.
    - (2) Number of locations: **3 per plan**
    - (3) Antenna installed by others.
  - (c) Smoke detectors
    - (1) Quantity: **as required by Code**
    - (2) Type: **Electric**
    - (3) Locations: **Per Code**
  - (d) Security system
    - (1) Rough in: **Optional**
    - (2) Complete system: **Optional**
  - (e) Entry door chime
    - (1) Button location: **Front door**
    - (2) Chime location: **Front Hall**

## M. Insulation

1. Exterior walls
  - (a) Batt insulation: **Yes**
  - (b) Sheathing: **½" OSB Board**
2. Attic ceiling: **R-value: R-30**
  - (a) Batts: **yes**
  - (b) Air-Seal system: **Yes**
4. Special insulation situations: **Contractor to provide optional prices to insulate under master bedroom addition.**

## N. Drywall

1. Normal conditions: **½" gypsum board**

## IV. Interior Finishes

## A. Flooring

1. Flooring schedule
  - (a) Family room: **Hardwood: Allowance \$2,600**
  - (b) Kitchen: **Vinyl Allowance \$1200**
  - (c) Breakfast: **Vinyl allowance \$800**
2. Carpeting: **Allowance: \$1,500/\$35/yard**

## B. Interior doors and trim

1. Interior doors
  - (a) Style: **Raised panel with wood grain, paint grade, hardboard doors, two hinges.**
  - (b) Sizes, swings: **Per plan**
2. Trim chart:

<b>Location</b>	<b>Base</b>	<b>Casing</b>	<b>Crown</b>	<b>Chair</b>	<b>Special</b>
<b>Family room</b>	<b>1×4/CAP</b>	<b>DC98</b>	<b>No</b>		
<b>Kitchen</b>	<b>1×4/CAP</b>	<b>DC98</b>	<b>No</b>		
<b>Breakfast</b>	<b>1×4/CAP</b>	<b>DC98</b>	<b>No</b>		

## C. Interior Pain/stain

1. Standards include:
  - (a) Manufacturer: **Duron/Flidden or equal**
  - (b) Walls and ceilings: **Flat latex paint**
  - (c) Painted trim and doors: **Latex semi-gloss**
  - (d) Kitchen work areas and bathrooms—**Latex low-luster or egg shell finish**(e) **\_Mixed colors and custom painting will be proced out as extras.**

## D. Finish Hardware

1. Interior door locks: **per plans**
  - (a) **Homeowner will purchase all interior passage sets**
  - (b) **Master Builder Group Inc. will install all interior passage sets**
2. Miscellaneous hardware
  - (a) Closet poles: **Wood**
  - (b) Coat hooks: **not included**
  - (c) Door stops: **spring type**
  - (d) Misc. hardware: **none**

## Additional Forms

To assist you in the process of managing emotional homeowners on every job you do, this appendix includes 4 checklists that will make your life easier. These forms are also included on the diskette that came with this book. These forms are:

- The preliminary job checklist (Figure D-1)
- The project completion checklist (Figure D-2)
- The project selection checklist (Figure D-3)
- The project startup checklist—special orders (Figure D-4)

**FIGURE D.1 Preliminary Job Checklist**

Use this checklist when you first go out to a homeowner’s property. It will help you remember key features that you will need to reference when putting together an estimate.

DATE: \_\_\_\_\_ SALESPERSON: \_\_\_\_\_ CLIENT#: \_\_\_\_\_

BUYERS: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

REMODELING GOALS					
<input type="checkbox"/> Room Addition	<input type="checkbox"/> Kitchen	<input type="checkbox"/> Bath	<input type="checkbox"/> Deck	<input type="checkbox"/> Garage	<input type="checkbox"/> Patio
<input type="checkbox"/> Screen Porch	<input type="checkbox"/> Sunroom	<input type="checkbox"/> Attic	<input type="checkbox"/> Basement	<input type="checkbox"/> Carport	<input type="checkbox"/> Skylights
<input type="checkbox"/> Other					

List overall objectives:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Design Fees Quoted: \_\_\_\_\_

Budget: \_\_\_\_\_  Firm?  Flexible?  Prelim Estimate: \_\_\_\_\_

Financing:  Cash  Home Imp Loan  Refinance  Other \_\_\_\_\_

How many family members? Adults \_\_\_\_\_ Teens \_\_\_\_\_ Children \_\_\_\_\_

Common utilities: Electrical Panel location \_\_\_\_\_ Circuits avail? \_\_\_\_\_  
 Gas  Propane  Other \_\_\_\_\_

Sewer:  Flat  Sloping  Trees impacting work area  
Accessibility: \_\_\_\_\_ Height above grade: \_\_\_\_\_

Type of house:  Single Story  Two story  Multi-level  
 Other \_\_\_\_\_  
 Basement  Crawl space  Attic  
 Other \_\_\_\_\_

Foundation:  Block  Block/Brick  Concrete  Wood  
 Other \_\_\_\_\_



**FIGURE D.1 Preliminary Job Checklist (Continued)**

**Construction:**  Masonry       Frame       Post and Beam

**Exterior:**       Stucco       Horizontal Hardboard       Vertical Hardboard  
 Wood       Brick       Block  
 Other: \_\_\_\_\_

**Windows:**       Casement       Slider       Double Hung       Awning  
 Brand \_\_\_\_\_       Aluminum       Steel       Wood  
 Color \_\_\_\_\_       Mullions?

**Roof:**       Composition       Shakes       Slate  
 Other \_\_\_\_\_       Slope \_\_\_\_\_  
 Overhangs \_\_\_\_\_ in.       Side Overhangs \_\_\_\_\_ in.  
 Gutter and DS Size? \_\_\_\_\_

**Interior**       Drywall       Plaster       Paneling  
 Other \_\_\_\_\_

**Ceilings:**       Flat \_\_\_\_\_ ft. \_\_\_\_\_ in. high       Sloped \_\_\_\_\_  
 Cathedral Details \_\_\_\_\_       Flat finish  
 Acoustical Spray       Textured  
 Other \_\_\_\_\_

**HVAC:**  Gas       Electric       Heat pump       Hot water       Air cond.  
 Other \_\_\_\_\_

**Floors:**       Carpet       Hardwood       Vinyl       Tile  
 Other \_\_\_\_\_

**Doors:**       Flush       Raised panel wood       Raise panel solid  
 Other \_\_\_\_\_

**Trims:**       Hardware style \_\_\_\_\_       Molding style \_\_\_\_\_  
 Wallpaper \_\_\_\_\_

**Additional notes:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Final Checklist:**  Floor plan drawn       Measurements taken       Plat plan obtained  
 Job site photographed       Special conditions noted



### FIGURE D.3 Project Selection Checklist

Getting homeowners to acknowledge project selections as well as selection deadlines will eliminate a number of disagreements that can arise before project completion.

OWNER'S NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

PHONE (HOME) \_\_\_\_\_ Work: \_\_\_\_\_ Work: \_\_\_\_\_

✓✓ NOTE: The date on each selection line is the date that the selection must be made by so that the job will be completed on schedule. If selections are not made on time, then our subcontractors may charge extra and it may delay the next phase of the job that will ultimately postpone the completion of the job.

#### Contact Person

#### Owner's Sign off

( ) Light Fixture: \_\_\_\_\_ ( )  
 Allowance: \_\_\_\_\_ ( )

#### FLOORING

( ) Carpet \_\_\_\_\_ ( )  
 Allowance: \_\_\_\_\_ ( )

( ) Resilient Flooring \_\_\_\_\_ ( )  
 Allowance: \_\_\_\_\_ ( )

( ) VCT Flooring \_\_\_\_\_ ( )  
 Allowance: \_\_\_\_\_ ( )

( ) Hardwood Flooring Stain \_\_\_\_\_ ( )  
 Allowance: \_\_\_\_\_ ( )

#### KITCHEN

( ) Kitchen Cabinets: \_\_\_\_\_ ( )  
 Allowance: \_\_\_\_\_ ( )

( ) Kitchen Counter Top \_\_\_\_\_ ( )  
 Allowance: \_\_\_\_\_ ( )

( ) Kitchen Range: \_\_\_\_\_ ( )  
 Allowance by Owner: \_\_\_\_\_ ( )

( ) Kitchen Refrigerator \_\_\_\_\_ ( )  
 Allowance by Owner: \_\_\_\_\_ ( )

**FIGURE D.3 Project Selection Checklist (Continued)**

<b>Contact Person</b>	<b>Owner's Sign off</b>
( ) Kitchen Oven: _____	( )
Allowance by Owner: _____	( )
( ) Kitchen Microwave _____	( )
Allowance: _____	( )
( ) Kitchen Disposal: _____	( )
Allowance: _____	( )
<b>CERAMIC TILE TOTAL ALLOWANCE</b>	
( ) Master Bath Floor: _____	( )
Grout Color: _____	( )
( ) Master Bath Shower Walls: _____	( )
Grout Color: _____	( )
( ) Hall Bath Floor: _____	( )
Grout Color: _____	( )
( ) Hall Bath Walls: _____	( )
Grout Color: _____	( )
<b>VANITIES</b>	
( ) Master Bath Vanities: _____	( )
Allowance: _____	( )
( ) Hall Bath Vanities: _____	( )
Allowance: _____	( )
<b>PLUMBING FIXTURES</b>	
( ) Kitchen Faucet: _____	( )
Allowance: _____	( )
( ) Kitchen Sink: _____	( )
Allowance: _____	( )
( ) Master Bath Vanity Faucet: _____	( )
Allowance: _____	( )
( ) Master Bath Shower Faucet: _____	( )
Allowance: _____	( )
( ) Master Bath Whirlpool _____	( )
Allowance: _____	( )
( ) Powder Room Pedestal Sink: _____	( )
Allowance: _____	( )

### FIGURE D.3 Project Selection Checklist (Continued)

**Contact Person** **Owner's Sign off**

( ) Powder Room Faucet: \_\_\_\_\_ ( )  
 Allowance: \_\_\_\_\_ ( )

#### BATH HARDWARE

( ) Master Bath Towel Bar: \_\_\_\_\_ ( )  
 Allowance: \_\_\_\_\_ ( )

( ) Master Bath TP Holder: \_\_\_\_\_ ( )  
 Allowance: \_\_\_\_\_ ( )

( ) Hall Bath Towel Bar:: \_\_\_\_\_ ( )  
 Allowance: \_\_\_\_\_ ( )

( ) Hall Bath TP Holder: \_\_\_\_\_ ( )  
 Allowance: \_\_\_\_\_ ( )

( ) Powder Room Towel Bar: \_\_\_\_\_ ( )  
 Allowance: \_\_\_\_\_ ( )

( ) Powder Room TP Holder: \_\_\_\_\_ ( )  
 Allowance: \_\_\_\_\_ ( )

#### PAINTING

Wall Color: \_\_\_\_\_ ( )

Trim Color: \_\_\_\_\_ ( )

Exterior Color: \_\_\_\_\_ ( )

#### OTHER

Fireplace Mantel: \_\_\_\_\_ ( )

Allowance: \_\_\_\_\_ ( )

Painted or Stained Stair Pickets: \_\_\_\_\_ ( )

Other/Misc: \_\_\_\_\_ ( )

Other/Misc: \_\_\_\_\_ ( )

The above selections have been reviewed by the owner, and are hereby approved for ordering and installation.

OWNER: \_\_\_\_\_ BUILDER: \_\_\_\_\_

Accepted this \_\_\_\_\_ day of \_\_\_\_\_ By: \_\_\_\_\_

By: \_\_\_\_\_





---

# Notes

1. “Fear Factor,” *Remodeling*, Vol. 9, No. 7 (July 1993).
2. “Fear Factor”
3. Home Referral Connection Service, *Consumer Guide #5: Surviving the Remodeling Process*, Consumer Guide 5 (Silver Spring, MD: Home Referral Connection Service, 1996)
4. Reprinted with permission from the American Arbitration Association (AAA).
5. Reprinted with permission from the American Arbitration Association (AAA).



# Interviewing Your Contractor: Get it Right!!!

A Contractor Selection Guidebook

It's a bold title, and it's meant to get your attention. There are a lot of fly by night contractors around. I'm sure you've heard the stories. But at the same time, there are also some very good contractors in business with an ongoing commitment to quality construction and good customer service. You just have to know how to find them.

The purpose of this guidebook is to start your process of selecting a contractor that will give you what you both want and need.

Virtually all homeowners approach the contractor selection process with anxiety and dread. Some feel prospective contractors won't be completely honest about cost and fear being tempted by appealing promises or low-ball estimates. The abundance and variety of construction horror stories leads others to believe there are only unqualified contractors out there ready to take advantage of the unsuspecting. Then others despair because they've heard of a homeowner who did shop carefully, hired a "very reputable" contractor and still had a bad experience. Its little wonder most home owners feel unsure where to begin and what questions to ask.

Feeling confident you'll choose well is very difficult. If we add the haunting thought that thousands of dollars are at stake to this mix of doubt and dread, the burden's enough to keep many from ever starting.

I encourage you to step beyond this bind. During the selection process your fears don't have to rule you because it's possible to find not just a good, but an excellent contractor. By following my plan, you'll learn how to spot good contractors, build a list of qualified candidates, and test them so you choose the contractor best suited for your job. You'll find the selection process is not only manageable, but also informative and rewarding. As a bonus, it can aid in the development and refinement of your home's design.

Below is a summary of the simple steps you'll need to take to find the right contractor. As you look over this list you may think "this looks too easy and obvious to be of any use." On one level you are correct. When you think about it, the plan IS obvious and very straightforward. But as you read on, you'll see that I equip you with two powerful tools that make you master of the process.

1. You'll learn to ask the questions that matter most.
2. You'll learn who to ask those questions to and when to ask them.

## PART ONE:

### THE INTRODUCTORY CALL, YOUR FIRST CONTACT WITH PROSPECTIVE CONTRACTORS

Most people don't like interviewing contractors because they don't have confidence in their ability to discern if a contractor is honest. If you've done your homework with thoroughness and patience, you've spared yourself that anxiety because you already know your candidates are qualified, honest and reliable.

When you begin contractor interviews, your task will be to locate a contractor you can work with, one whose interest in your project impresses you, one who listens carefully to what you say. The goal of this quest is to find compatibility with a contractor whom you'll be able to work with successfully for the time necessary to complete your project.

Once you're ready to begin the interviewing process, call the contractors in the order you've rated them. Be prepared to describe your project and state when you'd like to begin construction.

When you call the contractors on your list, have three to five preliminary questions ready to ask each. Here are some suggestions:

1. Have you completed a job similar to this before?
2. Do you have a list of references that I can contact?
3. When will you be able to start the job?
4. When could we meet in person to further discuss this? (*only* if you're encouraged by the answers they give).

There is no set script for these calls. In fact, in the course of some conversations a builder may offer everything contained above and more. Be aware of how easily the conversation progresses. When you hang up, make a few notes on the conversations. What were your impressions of the builder? Did he listen well? Did he answer your questions thoroughly?

## PART TWO:

### YOUR FIRST MEETING WITH PRESELECTED CONTRACTORS

In this new relationship, common courtesy is a must and good contractors understand this. If a contractor fails to show up for your first meeting and does not call to reschedule, cross him off your list.

Also let me state definitively that all principal parties should be present at this initial and all subsequent meeting. This includes the contractor and BOTH spouses, if applicable.

This is absolutely essential for all parties to participate fully in the interview process and for everyone to operate with equal information.

Listed here are questions you should ask during your first meeting.

## CONTRACTOR QUESTIONS

### BUSINESS IDENTITY:

- How long has the firm been in business?
- What is their permanent business address?
- Is the prospect licensed to work in your area?
- What year was the business initially licensed?

### BUSINESS PRACTICES

- How does the company ensure warranty service complaints are effectively handled?
- In case of any accident, is the company insured against workman's compensation claims, property damage or personal liability?
- How does the company maintain good customer relationships throughout the construction and warranty period? (**applicable in longer projects**)
- What will the payment or draw schedule look like (**applicable in longer projects**)

### BUILDING PRACTICES (**applicable in longer projects**)

- Who will be assigned as the project or site supervisor?
- Who will be your contact if that person is not available?
- Will there be a supervisor on the site full time?
- Will they be providing a written construction schedule?
- What's the company's routine regarding regular meetings with the homeowners during construction?
- Who will attend those meetings? Will the builder personally attend every meeting?
- Can I expect to see workers at the site every day?
- Does the builder plan to stay personally involved in the project at all points?
- May I have the names and numbers of five homeowners you've completed projects for?
- May I visit a site where work is in progress?

Note: A visit to a site in progress can reveal much about a company's ability to manage a large project. Notice how organized it looks. Is it messy and chaotic or does it seem well-organized with workers moving like they know what they are doing?

This list is not intended to be exhaustive. In fact, it should help you generate other, more personal questions.

I cannot encourage you strongly enough to ask any questions you may have. Nothing is off limits concerning your project or the company you're interviewing. Asking good, detailed questions is the heart of your due diligence. If you don't question thoroughly, you're giving up your responsibility in this process and possibly compromising the quality of your project.

#### HOW TO NARROW THE FIELD: TRUST BUT VERIFY

You should suggest second meetings with your preferred candidates to discuss your project in greater detail. Second meetings provide an important chance to ask those questions you overlooked in your first meeting, plus the key questions that will enable you to identify the builder you'll move forward with. Trust the representations your favorites make, but verify them. Your due diligence may protect you from confusing an itinerant contractor with an established professional.

Below I outline steps to objectively verify your candidates' business representations. Among them are several items you should address during your second meetings if you didn't during your first.

Number one, they should be licensed, as required

Second, obtain proof of insurance. The contractor should supply you with a Certificate of Insurance indicating it has a sufficient general liability and workmen's compensation insurance. Additionally, the contractor should have coverage against theft of any materials delivered to the job site but not yet installed.

Number three; confirm the builder's business address. He may have an office, but it's also common for builders to work out of their homes. Ask for a visit just to confirm your candidate isn't working out of the back of a truck or a post office box. What you're trying to determine here is your candidate's permanence.

Number four; for bigger projects, you can call the Better Business Bureau and your local consumer affairs office to check the company for consumer complaints. Better Business Bureaus (BBBs) are non-profit organizations supported primarily by local businesses, which encourage honest advertising and selling practices and keep records of consumer complaints. Check your candidates' records, but remember that just as there are unreliable contractors, there are also unreasonable homeowners. Even a good contractor can receive a complaint. If a favorite has a complaint, ask for information about its resolution. If he addressed it quickly and to the client's satisfaction, that's a sign of professionalism.

DATE \_\_\_\_\_

## I. GENERAL CONDITIONS

### A. Permits, Bonds, Insurance, Warranties

1. Building and other permits and related bonds to be paid by Master Builder Group Inc.
2. Local area permits and approvals by Master Builder Group Inc.
3. Builders' risk insurance to be carried and paid for by Master Builder Group Inc.

## II. LOT PREPARATIONS

### A. Lot Preparation

1. Clearing
  - (a) Trees, shrubs and debris will be removed from within the limits of clearing as defined on the final site plan.
  - (b) All areas beyond the limits of clearing will remain in as is condition.
  - (c) Tree preservation: It is the intention of Master Builder Group Inc. to make every effort to preserve all trees selected for preservation within the limits of clearing. However in the event any trees do die during or after construction, Master Builder Group Inc. is not responsible for their removal. Any trees which must be removed after clearing will be charged as an extra to the client. **(Note: Tree near addition may be lost.)**
2. Dirt filling or hauling **N/A**
  - (a) Contract is based on a balanced lot- filling or hauling of dirt will be done as an extra to the client.
3. Excavation
  - (a) To be done per site plan; dirt will be stored on lot and used in backfill and site grading.
  - (b) Rock clause; contract is based on normal earth conditions; if rock, spring water, or any unusual conditions or obstacles are encountered during any required excavation work or earth movement work, all related earth work as well as extra construction will be charged as an extra to the client.

- (c) Earthwork or construction caused by subgrade conditions not indicated on the site plan dated **June 2000** will be charged as an extra to the client

B. Lot finishes

1. Driveway:

**Master Builders Group Inc. shall not be responsible for damage to the driveway unless it is caused by gross negligence.**

- (a) Includes fine grading, fine gravel, base and finish.
- (b) Material/description: **Asphalt**
- (c) Special driveway notes: **Re-asphalt driveway allowance \$1,200**

2. Patio and patio steps:

- (a) Material/description: **Pressure-treated lumber**
- (b) Size: **per plans**
- (c) Special stoop/walk notes: **N/A**

3. Retaining walls

- (a) Location: **per plans**      Size: **per plans**      Material/description: **per plans**  
**Brick and CMU retaining wall with rowlock cap.**
- (b) Special retaining wall notes: **Vertical and horizontal reinforcing 16" O.C.**

4. Landscaping

- (a) Washed-out areas will be re-seeded or sodded at the discretion of Master Builder Group Inc.

### III. HOUSE CONSTRUCTION

A. Excavation & Backfill

- 1. To be done per site plan, dirt will be stored on lot for backfill.
- 2. Rock Clause.

B. Footing and foundation walls

1. Footings: **Per plans**

- (a) Materials: **Concrete**
- (b) Length: **Per plans**
- (c) Width: **Per plans**

- (d) Depth: **Per plans**
- 2. Foundation walls
  - (a) Materials: **CMU Block**
  - (b) Height (from top of slab to top of wall): **Per plans**
  - (c) Thickness: **8"**
  - (d) Reinforcements: **Per plans**
- C. Damp proofing
  - 1. Parging: **(3/4-inch waterproof cement applied over exterior block walls below grade. [CMU walls only]).**
  - 2. Tarring: **Liquid bituminous asphalt coating on exterior side of foundation below grade.**
  - 3. Drain tile: **Per plans**
- D. Brick exterior walls: **Basement stairwell per plans**
- E. Framing
  - 1. Joists: **2x8**
  - 2. Plywood decking: **3/4" T&G**
  - 3. Wall construction: **2x4**
  - 4. Roof construction
    - (a) Structure: **trusses and hand-framed sections per plan**
    - (b) Plywood: **1/2 CDX**
- F. Roofing
  - 1. Felt paper: **15 lb.**
  - 2. Shingles: **CertainTeed**
    - (a) Type: **fiberglass XT25**
    - (b) Guarantee: **25 years**
  - 3. Gutters and down spouts
    - (a) Materials: **5" seamless aluminum; 032 guage**
    - (b) Color: **White**
  - 4. Ridge vent: **Yes**
- G. Skylights
  - 1. Location: **Per plan**

2. Size: **Per plan**
3. Description: **Velux FS106**

#### H. Exterior doors and windows

1. Front entrance way
  - (a) Door description: **TBD/Homeowner allowance \$750**
  - (b) Jamb description:
  - (c) Pre-drilled:
  - (d) Sidelights:
  - (e) Transom:
  - (f) Finish:
2. Location: **Off family room**
  - (a) Size: **12'0" x 6'8" Andersen sliding glass door**
  - (b) Materials: **Wood/vinyl clad**
  - (c) Glass: **Insulated**
  - (d) Screens: **Yes**
3. Location: **Off breakfast area, Andersen sliding glass door**
  - (a) Size: **6'0" x 6'8"**
  - (b) Materials: **Wood/vinyl clad**
  - (c) Glass: **Insulated**
  - (d) Screens: **Yes**
4. Window units
  - (a) Brand: **Andersen**
  - (b) Style/description: **Double hung**
  - (c) Glass: **insulated**
  - (d) Size and type: **Per plans**
  - (e) Grill styles: **Prairie grills/special order**
  - (f) Screens/standards: **Yes**
  - (g) Special: **Trimline double hung, clad wood windows, (7) plus (7) sets of Prairie grills and low "E" glass.**

#### I. Exterior wall surfaces

1. Brick facade
  - (a) Location per plans: **basement stairway**



- (b) Selection: **to match existing**
  - 1) **Brick**
  - 2) **Mortar**
- 2. Siding: **Norandex .44 guage**
  - (a) Locations: **per plan**
  - (b) Materials: **Vinyl**
- J. Exterior Painting
  - 1. Prime all exterior soffits, windows, trim, doors (except clad material), and **one (1) coat of Exterior Alkyd.**
    - (a) Manufacturer and type: **Glidden/Duron or equal**
    - (b) **Color(s): per homeowner**
  - 2. Front entrance way: **per homeowner**
  - 3. Treated lumber (decks) are left natural due to the characteristics of the lumber.
- K. Heating, venting & air conditioning system (HVAC)
  - 1. Heating and cooling equipment
    - (a) Heating plant
      - (1) Energy source: **Existing**
    - (b) Cooling plant
      - (1) Energy source: **Electrical**
        - (a) Unit description: **Carrier**
        - (b) Tonnage: **2-1/2 ton**
        - (c) Unit location: **Existing location**
      - (2) Distribution: **Per plans**
      - (3) Registers: locations and numbers: **Per plans**
      - (4) Humidifier: **Optional**
      - (5) Air cleaner: **Optional**
      - (6) Dryer vent: **vented to outside: hookup to appliance not included**
      - (7) Bathroom fans: **Included for each toilet location**
      - (8) Attic fans: **See roofing section III. 1**

- L. Electrical wiring system
1. Amperage: **200 (200 minimum heavy up)**
  2. Panel(s): **One**
    - (a) Location: **Existing**
    - (b) Description: **Electrical contractor will increase panel size**
  3. Wiring: **All insulated copper**
  4. Receptacles
    - (a) Duplex, grounded: **Outlets**
    - (b) Quantity: **As per plan**
    - (c) G.F.I.: **Outlets/as required per electric Code**
    - (d) Exterior waterproof outlets: **As per plan**
  5. Switches
    - (a) Locations: **Per plan**
    - (b) Quantity: **Per plan**
    - (c) Switch Type: **Silent toggle**
    - (d) Color: **Ivory**
    - (e) Cover plates: **Metal - Ivory**
  6. Fixtures: **Allowance: \$1,400**
    - (a) Locations per plan
    - (b) Interior and exterior surface mounted fixtures
      - (1) Allowance budget includes all:
        - Hanging fixtures
        - Doorbell chime
        - Miscellaneous interior fixtures
        - Exterior lights
        - Light bulbs, tax, delivery charges
        - Recessed fixtures
      - (2) Exterior flood lights
      - (3) Master Builder Group Inc. is to provide client with fixture chart after rough-in is completed.
  7. Other pre-wired systems
    - (a) Telephone pre-wire: **Allowance \$500**
      - 1) Number of jack locations: **per plan**

- 2) Number of phone lines required: **2**
- (b) Television pre-wire: **Allowance \$200**
  - (1) Single coaxial cable run from wall receptacle locations to a common attic location.
  - (2) Number of locations: **3 per plan**
  - (3) Antenna installed by others.
- (c) Smoke detectors
  - (1) Quantity: **as required by Code**
  - (2) Type: **Electric**
  - (3) Locations: **Per Code**
- (d) Security system
  - (1) Rough in: **Optional**
  - (2) Complete system: **Optional**
- (e) Entry door chime
  - (1) Button location: **Front door**
  - (2) Chime location: **Front Hall**

#### M. Insulation

- 1. Exterior walls
  - (a) Batt insulation: **Yes**
  - (b) Sheathing: **1/2" OSB Board**
- 2. Attic ceiling: **R-value: R-30**
  - (a) Batts: **yes**
  - (3. Air-Seal system: **Yes**
- 4. Special insulation situations: **Contractor to provide optional prices to insulate under master bedroom addition.**

#### N. Drywall

- 1. Normal conditions: **1/2" gypsum board**

### IV. INTERIOR FINISHES

#### A. Flooring

- 1. Flooring schedule
  - (a) Family room: **Hardwood: Allowance \$2,600**

(b) Kitchen: **Vinyl Allowance \$1200**

(c) Breakfast: **Vinyl allowance \$800**

2. Carpeting: **Allowance: \$1,500/\$35/yard**

B. Interior doors and trim

1. Interior doors

(a) Style: **Raised panel with wood grain, paint grade, hardboard doors, two hinges.**

(b) Sizes, swings: **Per plan**

2. Trim chart:

Location	Base	Casing	Crown	Chair	Special
Family room	1x4/CAP	DC98		No	
Kitchen	1x4/CAP	DC98		No	
Breakfast	1x4/CAP	DC98		No	

C. Interior Pain/stain

1. Standards include:

(a) Manufacturer: **Duron/Flidden or equal**

(b) Walls and ceilings: **Flat latex paint**

(c) Painted trim and doors: **Latex semi-gloss**

(d) Kitchen work areas and bathrooms - **Latex low-luster or egg shell finish**

(e) Mixed colors and custom painting will be proced out as extras.

D. Finish Hardware

1. Interior door locks: **per plans**

a) **Homeowner will purchase all interior passage sets**

b) **Master Builder Group Inc. will install all interior passage sets**

2. Miscellaneous hardware

(a) Closet poles: **Wood**

(b) Coat hooks: **not included**

(c) Door stops: **spring type**

(d) Misc. hardware: **none**

Date \_\_\_\_\_

## I. General Conditions

### A. Permits, Bonds, Insurance, Warranties

1. Building and other permits and related bonds to be paid by. \_\_\_\_\_
2. Homeowner association approvals by owner.
3. Builder's risk insurance to be carried and paid for by. \_\_\_\_\_

### B. Engineering, Architect, Consultants

1. Site engineering including house site, various stakeouts, wall checks, and final survey to be paid for. \_\_\_\_\_
2. Architect and blueprint fees to be paid for by. \_\_\_\_\_
3. Special \_\_\_\_\_ engineering problems. \_\_\_\_\_
4. Special Consultants. \_\_\_\_\_

### C. Utilities

1. Utility Usage Bills
  - (a) Temporary electric, telephone, house electric, water, sewer, and gas bills to be paid by \_\_\_\_\_ until such time as house is already for delivery to client, except for punch list items or delays caused by client selections or extras.
  - (b) House telephone bill to be paid by client. Remodeler to pay for all long distance calls from company employees or trade contractors.

## II. Lot Improvements (for additions)

### A. Lot Preparation

1. Clearing
  - (a) Trees, shrubs and debris will be removed from within the limits of clearing as defined on the final site plan.
  - (b) All areas beyond the limits of clearing will remain in as is condition.
  - (c) Tree preservation. Master builder group intends of to make every effort to preserve all trees selected for preservation within the limits of clearing. However, in the event any trees do die during or after construction, remodeler is not responsible for their removal. Any trees that must be removed after clearing will be charged as an extra to the client.

2. Dirt Filling or Hauling

(a) Contract is based on a balanced lot. Filling or hauling of dirt will be done as an extra to the client.

3. Excavation

(a) To be done per site plan. Dirt will be stored on lot and used in backfill and site grading.

(b) Rock clause. Contract is based on normal earth condition; if rock, spring water, or any other usual conditions or obstacles are encountered during any required excavation or earth movement work, then all related earth work as well as extra construction will be charged as an extra to the client.

(c) Earthwork or construction caused by subgrade conditions not indicated on the site plan dated \_\_\_\_\_ will be charged as an extra to the client.

B. Lot Finishes

1. Driveway: Remodeler shall not be responsible for damage or repair of the driveway unless it is caused by gross negligence.

(a) Includes fine grading, fine gravel, base, and finish.

(b) Material/Description: \_\_\_\_\_  
\_\_\_\_\_

(c) Special driveway notes: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. Front Steps and Front (Lead) Walk

(a) Material/Description: \_\_\_\_\_  
\_\_\_\_\_

(b) Size: \_\_\_\_\_  
\_\_\_\_\_

(c) Special stoop/walk notes: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. Patio and Patio Steps

(a) Material/Description: \_\_\_\_\_

\_\_\_\_\_  
(b)  
Size: \_\_\_\_\_

(c) Special \_\_\_\_\_ project \_\_\_\_\_ stoop/walk  
notes: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

4. Deck

(a) Materials.

(1) \_\_\_\_\_ Structural  
members: \_\_\_\_\_

(2) Deck surface: \_\_\_\_\_

(3) Handrails: \_\_\_\_\_

(b) Stairs: \_\_\_\_\_

(c) Size/Description: \_\_\_\_\_

(d) Special deck notes: \_\_\_\_\_

5. Retaining Walls

(a) Location: \_\_\_\_\_

(b) Size: \_\_\_\_\_

(c) \_\_\_\_\_  
Material/Description: \_\_\_\_\_

(d) Special \_\_\_\_\_ retaining \_\_\_\_\_ wall  
notes: \_\_\_\_\_

6. Entry Stanchions/Mailbox

(a) \_\_\_\_\_  
Material/Description: \_\_\_\_\_

(b) Stanchions/Mailbox  
notes: \_\_\_\_\_

7. Landscaping

(a) Seed/Sod: All disturbed areas within the limits of clearing will be covered with \_\_\_\_\_ except those areas designated for planting bed.

(b) Plantings:  
Description \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

(c) Washed out areas will be re-seeded or sodded at the discretion of:  
\_\_\_\_\_

C. \_\_\_\_\_  
Projects: \_\_\_\_\_ Special \_\_\_\_\_ Lot \_\_\_\_\_

**III. House Construction**

A. Excavation and Backfill

1. To be done per site plan; dirt will be stored on lot for backfill.
2. Rock clause (Section II, 3B)

B. Footings and Foundation Walls

1. Footings

(a) Materials: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

(b) Length: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

(c) Width: \_\_\_\_\_  
\_\_\_\_\_



\_\_\_\_\_  
-  
(d) Depth: \_\_\_\_\_  
\_\_\_\_\_

2. Foundation Walls

(a) Materials: \_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
-  
(b) Height (from top of slab to top of wall): \_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
-  
(c) Thickness: \_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
-  
(d) Reinforcements: \_\_\_\_\_  
\_\_\_\_\_

C. Damp Proofing

1. Parging:  $\frac{3}{4}$ -inch waterproof cement applied over exterior or block walls below grade. (Concrete block walls only)
  2. Tarring: Liquid bituminous asphalt coating on exterior side of foundation below grade or
- \_\_\_\_\_

3. Drain Tile.

(a) Interior: \_\_\_\_\_  
\_\_\_\_\_

(b) Exterior drain tile  
system: \_\_\_\_\_

4. Sump Pump: in crock, draining to exterior

D. Basement Floor

1. Subslab Materials: gravel, poly, wire

2. Concrete Slab  
Depth: \_\_\_\_\_

3. Piers and Grade  
Beams: \_\_\_\_\_

4. Interior Drain  
Tile: \_\_\_\_\_

5. Sump Crock and  
Pump: \_\_\_\_\_

E. Steel/Lolly  
Columns: \_\_\_\_\_

F. Framing

1. Joists: \_\_\_\_\_

2. Wall  
Construction: \_\_\_\_\_

3. Roof Construction  
(a) Structure: \_\_\_\_\_

(b) Plywood: \_\_\_\_\_  
\_\_\_\_\_

---

G. Roofing

1. Felt  
Paper: \_\_\_\_\_

2. Shingles.  
(a) Type: \_\_\_\_\_  
\_\_\_\_\_

(b) Guarantee: \_\_\_\_\_  
\_\_\_\_\_

3. Gutters and Downspouts  
(a) \_\_\_\_\_ Materials:  
\_\_\_\_\_

(b) \_\_\_\_\_ Gauge  
\_\_\_\_\_

(c) \_\_\_\_\_ Color:  
\_\_\_\_\_

4. Attic  
Fans: \_\_\_\_\_

\_\_\_\_\_

5. Ridge  
Vent: \_\_\_\_\_

---

H. Skylights

1. Location (per  
plan): \_\_\_\_\_

---

2. Size (per  
plan): \_\_\_\_\_

---

3. Description: \_\_\_\_\_

---

4. Insulated Flat  
Glass: \_\_\_\_\_

---

I. Exterior Doors and Windows

1. Front Entrance Way.  
(a) Door  
description: \_\_\_\_\_

---

(b) Jamb  
description: \_\_\_\_\_

---

(c) Pre-drilled: 2 3/4-inch backset latch and deadbolt

(d) Sidelights: \_\_\_\_\_  
\_\_\_\_\_

(e) Transom:

(f) Finish:

2. Garage Entrance Door to House

(a) Size: \_\_\_\_\_  
\_\_\_\_\_

(b) Description: \_\_\_\_\_  
\_\_\_\_\_

3.

Location: \_\_\_\_\_  
\_\_\_\_\_

(a) Size: \_\_\_\_\_  
\_\_\_\_\_

(b) Description: \_\_\_\_\_  
\_\_\_\_\_

4.

Location: \_\_\_\_\_  
\_\_\_\_\_

(a) Size: \_\_\_\_\_  
\_\_\_\_\_

(b) Description: \_\_\_\_\_  
\_\_\_\_\_

---

5. Location: Sliding Glass Doors

(a)

Size: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

(b)

Materials: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

(c)

Glass: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

(d)

Screens: \_\_\_\_\_

\_\_\_\_\_

(e)

Special: \_\_\_\_\_

\_\_\_\_\_

---

6. Garage Doors

(a) Size

and

quantity: \_\_\_\_\_

\_\_\_\_\_

(b)

Style: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

(c) Garage

door

openers: \_\_\_\_\_

\_\_\_\_\_

7. Windows Units

(a) Brand: \_\_\_\_\_  
\_\_\_\_\_

(b) Style/Description: \_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_

(c) Glass: \_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_

(d) Size \_\_\_\_\_ and  
Type: \_\_\_\_\_

\_\_\_\_\_

(e) Grill  
Styles: \_\_\_\_\_

\_\_\_\_\_

(f) Screens/Standards: \_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_

(g) Special: \_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

J. Interior stairs

1. Location: Main- first to second

(a) General  
Description: \_\_\_\_\_

---

(b) Overall width: \_\_\_\_\_

---

(c) Landing(s) \_\_\_\_\_ floor  
finishes: \_\_\_\_\_

---

(d) Construction.  
(1) Left stringer: Open or Closed  
(2) Right stringer: Open or Closed  
(3) Treads: \_\_\_\_\_

---

(4) Risers: \_\_\_\_\_

---

(5) Nosings: \_\_\_\_\_

---

(e) Finish: \_\_\_\_\_

---

2. Location: Basement to First Floor

(a) General description: \_\_\_\_\_



(b) Overall width: \_\_\_\_\_

\_\_\_\_\_

(c) Landing(s)- \_\_\_\_\_ Floor  
Finishes: \_\_\_\_\_

\_\_\_\_\_

(d) Construction

(1) Left Stringer: Open or Closed

(2) Right stringer: Open or Closed

(3)

Treads: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

(4)

Risers: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

(5)

Nosings: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

(e)

Finish: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

3. Location:

(a) General description: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

(b) Overall width: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

(c) Landing(s) - Floor  
Finishes: \_\_\_\_\_

\_\_\_\_\_

(d) Construction.

(1) Left stringer: Open or Closed

(2) Right stringer: Open or Closed

(3)

Treads: \_\_\_\_\_

\_\_\_\_\_

(4)

Risers: \_\_\_\_\_

\_\_\_\_\_

(5)

Nosings: \_\_\_\_\_

\_\_\_\_\_

---

K. Exterior Wall Surfaces

1. Brick Façade

(a) Location (per plans): \_\_\_\_\_

\_\_\_\_\_

(b) Selection

(1)

Brick: \_\_\_\_\_

\_\_\_\_\_

(2)

Mortar: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

(3) Joint  
Style: \_\_\_\_\_

---

2. Stone Façade

(a) Location (per  
plans): \_\_\_\_\_

—  
(b) Selection

(1)  
Stone: \_\_\_\_\_

—  
(2)  
Installation: \_\_\_\_\_

---

3. Siding

(a) Locations( per  
plan): \_\_\_\_\_

—  
(b)  
Materials: \_\_\_\_\_

---

4. Cornice

Materials: \_\_\_\_\_

—  
5. Special Exterior  
Details: \_\_\_\_\_

---

L. Fireplace Construction

1.

Type: \_\_\_\_\_

\_\_\_\_\_

2. Location: \_\_\_\_\_

---

M. Interior Plumbing System

1. In-House Piping

(a) Water

Supply: \_\_\_\_\_

\_\_\_\_\_

(b) Waste

Water: \_\_\_\_\_

\_\_\_\_\_

(c)

Gas: \_\_\_\_\_

\_\_\_\_\_

2. Water Heater

(a)

Capacity: \_\_\_\_\_

\_\_\_\_\_

(b) Heat

Source: \_\_\_\_\_

3. Kitchen

(a) \_\_\_\_\_ sink(s),  
\_\_\_\_\_ dishwasher(s) and  
\_\_\_\_\_ disposal connections.

(b) Ice maker water  
line: \_\_\_\_\_

(c) Gas piping for cook top: \_\_\_\_\_

4. Laundry Room

(a) Washer connection: \_\_\_\_\_

(b) Gas dryer (if applicable) \_\_\_\_\_

(c) Laundry sink: \_\_\_\_\_

5. Basement Bath Rough-In: \_\_\_\_\_

\_\_\_\_\_

-

6. Bar(s)

(a) Location(s): \_\_\_\_\_

\_\_\_\_\_

—

(1) Bar sink(s): \_\_\_\_\_

\_\_\_\_\_

—

(2) Other \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

7. Bathrooms and Powder Room (see specifications for each location in Section IV, Finishes)

8. Exterior Hose Bibs

(a) Quantity: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

-

(b) Location(s): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

9. Water Meter and  
Service: \_\_\_\_\_

10. Special Interior  
Plumbing: \_\_\_\_\_

N. Heating, Venting and Air Conditioning System (HVAC)

1. Heating and Cooling Equipment, Zone 1 System

(a) Heating plant

(1) Energy  
source: \_\_\_\_\_

(2) Unit  
description: \_\_\_\_\_

(3) BTUs sized for  
house: \_\_\_\_\_

(4) Unit location ( per  
plans): \_\_\_\_\_

(b) Cooling plant

(1) Energy  
source: \_\_\_\_\_

(2) Unit  
description: \_\_\_\_\_

(3) Tonnage: \_\_\_\_\_

(4) Unit location: \_\_\_\_\_

(c) Distribution: \_\_\_\_\_

(d) Registers: \_\_\_\_\_ location \_\_\_\_\_ and number: \_\_\_\_\_

(e) Humidifier: \_\_\_\_\_

(f) Air cleaner: \_\_\_\_\_

(g) Dryer Vent: vented to outside

(h) Bath fans: included for each toilet location

(i) Attic fans: \_\_\_\_\_

(j) Laundry chute: \_\_\_\_\_

2. HVAC \_\_\_\_\_ specialty items: \_\_\_\_\_

---

---

O. Electrical Wiring System

1.

Amperage: \_\_\_\_\_  
\_\_\_\_\_

2. Panel(s)

(a)

Location(s): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

(b)

Description: \_\_\_\_\_  
\_\_\_\_\_

3. Wiring: All insulated Copper

4. Receptacles

(a) Duplex, grounded outlets.

(b) Quantity (per plan): \_\_\_\_\_

(c) GFCI outlets (as required per electric code): \_\_\_\_\_  
\_\_\_\_\_

(d) Exterior waterproof outlets (quantity per plan): \_\_\_\_\_  
\_\_\_\_\_

5. Switches

(a) Locations (per plan)

(b) Quantity (per plan)

(c)

Switches: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



(d) Color: \_\_\_\_\_  
\_\_\_\_\_

(e) Cover  
Plates: \_\_\_\_\_

6. Fixtures (allowance) \$ \_\_\_\_\_

(a) Locations (per plan)

(b) Interior and exterior surface-mounted fixtures

(1) Allowance budget includes-

- Hanging fixtures
- Doorbell chime
- Miscellaneous interior fixtures
- Exterior lights
- Light bulbs, tax, delivery charges
- Recessed fixtures

(2) Exterior lights: \_\_\_\_\_ flood  
\_\_\_\_\_

(3) Fixtures that are difficult to install may require extra labor charge.  
Notice  
will be provided prior to any additional labor charge.

(c) Recessed fixtures: \_\_\_\_\_  
\_\_\_\_\_

Description	Housing	Trim
1. _____ _____	1. _____	1.
2. _____ _____	2. _____	2.
3. _____ _____	3. _____	3.

7. Interior and exterior fixture chart

Location Selections	Quantity	Comments
------------------------	----------	----------

Front door: \_\_\_\_\_  
\_\_\_\_\_

Foyer: \_\_\_\_\_  
-

-  
1st \_\_\_\_\_ fl.  
hall: \_\_\_\_\_

-  
Dining  
room: \_\_\_\_\_

-  
Living  
room: \_\_\_\_\_

-  
Family  
room: \_\_\_\_\_

-  
2nd \_\_\_\_\_ fl.  
hall: \_\_\_\_\_

-  
Master  
bedroom: \_\_\_\_\_

-  
Master  
bathroom: \_\_\_\_\_

-  
Other  
bedroom: \_\_\_\_\_

-  
Other  
Bedroom: \_\_\_\_\_

-  
Other  
bathroom: \_\_\_\_\_

-  
Other  
bathroom: \_\_\_\_\_

---

-  
Powder  
room: \_\_\_\_\_

---

-  
Closets: \_\_\_\_\_  
—

---

-  
Laundry  
room: \_\_\_\_\_

---

8. Other pre-wired systems

(a) Telephone.

- (1) Number \_\_\_\_\_ of \_\_\_\_\_ jack  
locations: \_\_\_\_\_
- (2) Number \_\_\_\_\_ of \_\_\_\_\_ phone \_\_\_\_\_ lines  
required: \_\_\_\_\_
- (3) Telephones \_\_\_\_\_ not  
included. \_\_\_\_\_

---

(b) Television

- (1) Single coaxial cable run from wall receptacle locations to a common  
attic location.
- (2) Number \_\_\_\_\_ of \_\_\_\_\_  
locations: \_\_\_\_\_

- 
- (3) Antenna \_\_\_\_\_ installed  
by \_\_\_\_\_

(c) Smoke detectors

- (1) Quantity (as required by code)
- (2) Type: Electric
- (3) \_\_\_\_\_  
Locations: \_\_\_\_\_  
\_\_\_\_\_

---

(d) Security system

- (1) Rough-  
in: \_\_\_\_\_

---

(2) Complete system: \_\_\_\_\_

(e) Entry door chime

(1) Button location: \_\_\_\_\_

(2) Chime location: \_\_\_\_\_

(f) Sound system

(1) Sound system description and location: \_\_\_\_\_

(g) Central vacuum system

(1) System designed and installed by central vacuum specialist: \_\_\_\_\_

9 Smart House®: \_\_\_\_\_

10. Electrical Specialty Items: \_\_\_\_\_

---

P. Insulation

1. Exterior walls- R-  
value: \_\_\_\_\_  
(a) Batt insulation: \_\_\_\_\_  
(b) Sheathing: \_\_\_\_\_
2. Attic ceiling- R value  
: \_\_\_\_\_  
a) Batt insulation: \_\_\_\_\_  
b) Blown: \_\_\_\_\_
3. Garage ceiling- R-  
value: \_\_\_\_\_
4. Vaulted ceiling- R  
Value: \_\_\_\_\_
5. Basement: \_\_\_\_\_
6. Air-seal system: \_\_\_\_\_
7. Special insulation  
situations: \_\_\_\_\_

---

Q. Drywall

1. Normal conditions: 1/2-inch gypsum board
2. Type \_\_\_\_\_ drywall: installed in garage and other code-required situations.
3. Water resistant: installed in tub and shower surrounds unless otherwise noted.
4. Wonder board or  
equal: \_\_\_\_\_

---

## IV. FINISHES

### A. Flooring

#### 1. Flooring schedule

(a)

Foyers: \_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_

—

(b) Living  
room: \_\_\_\_\_  
\_\_\_\_\_

—

(c) Dining  
room: \_\_\_\_\_  
\_\_\_\_\_

—

(d) Family  
room: \_\_\_\_\_  
\_\_\_\_\_

—

(e) Powder room and first room  
hall: \_\_\_\_\_  
\_\_\_\_\_

—

(f)

Kitchen: \_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_

—

(g) Second floor  
hallway: \_\_\_\_\_  
\_\_\_\_\_

—

(h) Master  
bedroom: \_\_\_\_\_  
\_\_\_\_\_

---

(i) Breakfast  
room: \_\_\_\_\_

---

(j) Other  
bedrooms: \_\_\_\_\_

---

(k) Stairs: \_\_\_\_\_

---

(l) Laundry  
room: \_\_\_\_\_

---

2. Marble/ceramic tile

(a) Standards include

- (1) All bath tiles set on wonder board underlayment.
- (2) Installation of wall tile shall be on green board.

(b) Selection chart: ceramic tile (Please see section C-3, ceramic tile).

3. Carpet: \_\_\_\_\_ allowance:  
\$ \_\_\_\_\_

(a) allowance based on rooms listed above.

(b) Includes carpet, pad, installation, tax, and any other related charge.

(c) Pad and carpet installed directly over sub floor.

(d) Client to make selections directly with carpet contractor.

(1) Carpet contractor to warrant material and installation directly to client.

(2) Carpet contractor to meet remodeler's construction schedule, to cooperate with him or her on the job, and to remove their trash from the house.

(3) Carpet contractor is responsible for damage caused by his or her workers to the house.

(e) Carpet contractor

(1)

Company: \_\_\_\_\_

(2) Telephone: \_\_\_\_\_

(3) Person \_\_\_\_\_ to  
contact: \_\_\_\_\_

(f) Selection Chart (See Section A-I):

(2) Location(s): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

(3) Color: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

(4) Pad: \_\_\_\_\_

\_\_\_\_\_

4. Vinyl/Resilient Flooring (allowance)  
\$ \_\_\_\_\_

(a) Standards include: underlayment provided and installed by subcontractor.

(b) Selection chart: vinyl

(1) \_\_\_\_\_ Location(s)

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

(2) Tile: \_\_\_\_\_

\_\_\_\_\_



---

---

---

(3) Installation  
by: \_\_\_\_\_

---

---

---

---

---

B. Kitchen Finishes

1. Appliances

(a) Range, \_\_\_\_\_ manufacturer \_\_\_\_\_ and  
model: \_\_\_\_\_

(1) Energy  
source: \_\_\_\_\_

(2) Size  
limitation: \_\_\_\_\_

(3)  
Venting: \_\_\_\_\_

(b) Cook \_\_\_\_\_ top, \_\_\_\_\_ manufacturer \_\_\_\_\_ and  
model: \_\_\_\_\_

(1)  
Size: \_\_\_\_\_

(2) Energy  
source: \_\_\_\_\_

(3)  
Venting: \_\_\_\_\_

(c) Range, cook top ventilation, \_\_\_\_\_ manufacturer \_\_\_\_\_ and  
model: \_\_\_\_\_

(1) Size: \_\_\_\_\_  
\_\_\_\_\_

(2) Type: \_\_\_\_\_  
\_\_\_\_\_

(3) Finish: \_\_\_\_\_  
\_\_\_\_\_

(d) Wall ovens, manufacturer and  
model: \_\_\_\_\_  
\_\_\_\_\_

—  
(1) Energy source: \_\_\_\_\_

(2) Size limitation: \_\_\_\_\_

(3) Venting: \_\_\_\_\_  
\_\_\_\_\_

(e) Refrigerator, manufacturer and  
model: \_\_\_\_\_  
\_\_\_\_\_

—  
(1) Size limitation: \_\_\_\_\_

(2) Ice hookup: \_\_\_\_\_

(3) Finish: \_\_\_\_\_  
\_\_\_\_\_

(f) Dishwasher, manufacturer and  
model: \_\_\_\_\_  
\_\_\_\_\_

—  
(1) Size: \_\_\_\_\_  
\_\_\_\_\_

(2) Finish: \_\_\_\_\_  
\_\_\_\_\_

(g) Garbage disposal, manufacturer and  
model: \_\_\_\_\_  
\_\_\_\_\_

—

(h) Microwave, \_\_\_\_\_ manufacturer \_\_\_\_\_ and  
model: \_\_\_\_\_

\_\_\_\_\_

i) Size: \_\_\_\_\_

j) Other: \_\_\_\_\_

2. Kitchen cabinetry

(a) Layout: \_\_\_\_\_ see \_\_\_\_\_ enclosed \_\_\_\_\_ plan  
dated: \_\_\_\_\_

(b) Style \_\_\_\_\_ and  
Description: \_\_\_\_\_

(c) Finish: \_\_\_\_\_

(d) Hardware: \_\_\_\_\_

(e) Special  
details: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. Kitchen countertops

(a) Materials: \_\_\_\_\_

(b) Color: \_\_\_\_\_

(c) Backsplash: \_\_\_\_\_  
\_\_\_\_\_

(d) Special details: \_\_\_\_\_  
\_\_\_\_\_

4. Kitchen sink(s)

(a) Manufacturer \_\_\_\_\_ and  
model: \_\_\_\_\_

(b) Single \_\_\_\_\_ bowl \_\_\_\_\_ or \_\_\_\_\_ double  
bowl: \_\_\_\_\_

(c) Size: \_\_\_\_\_  
\_\_\_\_\_

(d) Finish: \_\_\_\_\_  
\_\_\_\_\_

5. Kitchen sink faucet(s)

a) Manufacturer \_\_\_\_\_ and  
model: \_\_\_\_\_

(b) Finish: \_\_\_\_\_  
\_\_\_\_\_

C. Bathrooms: Master Bath

1. Vanity

(a) Vanity Cabinets

(1) Layout: \_\_\_\_\_  
\_\_\_\_\_

(2) Style/material: \_\_\_\_\_  
\_\_\_\_\_

(3) Color \_\_\_\_\_ or  
finish: \_\_\_\_\_

(4) Hardware: \_\_\_\_\_  
\_\_\_\_\_

(b) Vanity top

(1) Materials: \_\_\_\_\_  
\_\_\_\_\_

(2) Color: \_\_\_\_\_  
\_\_\_\_\_

(c) Bowl  
(1) Manufacturer \_\_\_\_\_ and  
model: \_\_\_\_\_  
\_\_\_\_\_

(2) Color: \_\_\_\_\_  
\_\_\_\_\_

(3) Faucet hole spacing (4" or  
8"): \_\_\_\_\_

(d) Faucet(s)  
(1) Manufacturer \_\_\_\_\_ and  
model: \_\_\_\_\_  
\_\_\_\_\_

(2) Finish: \_\_\_\_\_  
\_\_\_\_\_

2. Plumbing fixtures

(a) Bath tub  
(1) Manufacturer \_\_\_\_\_ and  
model: \_\_\_\_\_  
\_\_\_\_\_

(2) Color: \_\_\_\_\_  
\_\_\_\_\_

(b) Bath tub faucet  
(1) Manufacturer \_\_\_\_\_ and  
model: \_\_\_\_\_  
\_\_\_\_\_

(2) Finish: \_\_\_\_\_  
\_\_\_\_\_

(c) Toilet  
(1) Manufacturer \_\_\_\_\_ and  
model: \_\_\_\_\_

---

(2) Color: \_\_\_\_\_

(3) \_\_\_\_\_ Lever  
finish: \_\_\_\_\_

(d) Shower  
pan: \_\_\_\_\_

(e) Shower faucet  
(1) Manufacturer \_\_\_\_\_ and  
model: \_\_\_\_\_

---

(2) Finish: \_\_\_\_\_

(3) \_\_\_\_\_ Special \_\_\_\_\_ shower  
features: \_\_\_\_\_

---

---

D. Bathrooms: Hall Bath

1. Vanity

(a) Vanity Cabinets

(1) Layout: \_\_\_\_\_

(2) Style \_\_\_\_\_ and  
material: \_\_\_\_\_

(3) Color  
finish: \_\_\_\_\_

(4) Hardware: \_\_\_\_\_

(b) Vanity Top

(1) Materials: \_\_\_\_\_

(2) Color: \_\_\_\_\_  
\_\_\_\_\_

(c) Bowl  
(1) Manufacturer \_\_\_\_\_ and  
model: \_\_\_\_\_  
\_\_\_\_\_

(2) Color: \_\_\_\_\_  
\_\_\_\_\_

(3) Faucet hole spacing (4" or  
8"): \_\_\_\_\_

(d) Faucet(s)  
(1) Manufacturer \_\_\_\_\_ and  
model: \_\_\_\_\_  
\_\_\_\_\_

(2) Finish: \_\_\_\_\_  
\_\_\_\_\_

2. Plumbing Fixtures

(a) Bath Tub  
(1) Manufacturer \_\_\_\_\_ and  
model: \_\_\_\_\_  
\_\_\_\_\_

(2) Color: \_\_\_\_\_  
\_\_\_\_\_

(b) Bath tub faucet  
(1) Manufacturer \_\_\_\_\_ and  
model: \_\_\_\_\_  
\_\_\_\_\_

(2) Finish: \_\_\_\_\_  
\_\_\_\_\_

(c) Toilet  
(1) Manufacturer \_\_\_\_\_ and  
model: \_\_\_\_\_

---

(2) Color: \_\_\_\_\_

(3) Lever finish: \_\_\_\_\_

(d) Shower pan: \_\_\_\_\_

(e) Shower faucet  
(1) Manufacturer \_\_\_\_\_ and  
model: \_\_\_\_\_

---

(2) Finish: \_\_\_\_\_

(3) Special \_\_\_\_\_ shower  
features: \_\_\_\_\_

---

---

---

---

E. Bathrooms: Basement

1. Vanity

(a) Vanity cabinets

(1) Layout: \_\_\_\_\_

(2) Style \_\_\_\_\_ and  
material: \_\_\_\_\_

(3) Color  
finish: \_\_\_\_\_

(4) Hardware: \_\_\_\_\_



(b) Vanity top

(1)

Materials: \_\_\_\_\_  
\_\_\_\_\_

(2)

Color: \_\_\_\_\_  
\_\_\_\_\_

(c) Bowl

(1) Manufacturer \_\_\_\_\_ and  
model: \_\_\_\_\_  
\_\_\_\_\_

(2)

Color: \_\_\_\_\_  
\_\_\_\_\_

(3) Faucet hole spacing (4" or  
8"): \_\_\_\_\_

(d) Faucet(s)

(1) Manufacturer \_\_\_\_\_ and  
model: \_\_\_\_\_  
\_\_\_\_\_

(2) Finish: \_\_\_\_\_  
\_\_\_\_\_

2. Plumbing fixtures

(a) Bath tub

(1)

Manufacturer/Model: \_\_\_\_\_  
\_\_\_\_\_

(2)

Color: \_\_\_\_\_  
\_\_\_\_\_

(b) Bath tub faucet

(1) Manufacturer \_\_\_\_\_ and  
model: \_\_\_\_\_  
\_\_\_\_\_

(2) Finish: \_\_\_\_\_  
\_\_\_\_\_

(c) Toilet

(1) Manufacturer \_\_\_\_\_ and  
model: \_\_\_\_\_  
\_\_\_\_\_

(2) Color: \_\_\_\_\_  
\_\_\_\_\_

(3) Lever  
finish: \_\_\_\_\_

(d) Shower  
pan: \_\_\_\_\_

(e) Shower faucet  
(1) Manufacturer \_\_\_\_\_ and  
model: \_\_\_\_\_  
\_\_\_\_\_

(2) Finish: \_\_\_\_\_  
\_\_\_\_\_

(3) Special \_\_\_\_\_ shower  
features: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

F. Bathrooms \_\_\_\_\_ (additional  
locations): \_\_\_\_\_

1. Vanity

(a) Vanity Cabinets

(1) Layout: \_\_\_\_\_  
\_\_\_\_\_

(2) Style \_\_\_\_\_ and  
material: \_\_\_\_\_

(3) Color  
finish: \_\_\_\_\_

(4) Hardware: \_\_\_\_\_  
\_\_\_\_\_

(b) Vanity top

(1) Materials: \_\_\_\_\_  
\_\_\_\_\_

(2) Color: \_\_\_\_\_  
\_\_\_\_\_

(c) Bowl

(1) Manufacturer \_\_\_\_\_ and  
model: \_\_\_\_\_

(2) Color: \_\_\_\_\_

(3) Faucet \_\_\_\_\_ hole \_\_\_\_\_ spacing(4" \_\_\_\_\_ or  
8"): \_\_\_\_\_

(d) Faucet(s)

(1) Manufacturer \_\_\_\_\_ and  
model: \_\_\_\_\_

(2) Finish: \_\_\_\_\_

2. Plumbing Fixtures

(a) Bath Tub

(1) Manufacturer \_\_\_\_\_ and  
model: \_\_\_\_\_

(2) Color: \_\_\_\_\_

(b) Bath tub faucet

(1) Manufacturer \_\_\_\_\_ and  
model: \_\_\_\_\_

(2) Finish: \_\_\_\_\_

(c) Toilet

(1) Manufacturer \_\_\_\_\_ and  
model: \_\_\_\_\_

(2) Color: \_\_\_\_\_

(3) Lever  
finish: \_\_\_\_\_

(d) Shower  
Pan: \_\_\_\_\_

(e) Shower Faucet  
(1) \_\_\_\_\_ Manufacturer \_\_\_\_\_ and  
model: \_\_\_\_\_

(2) \_\_\_\_\_  
Finish: \_\_\_\_\_

(3) \_\_\_\_\_ Special \_\_\_\_\_ shower  
features: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. Ceramic tile

Master bath

Floor: \_\_\_\_\_

Walls: \_\_\_\_\_

Product: \_\_\_\_\_

Tile

Color: \_\_\_\_\_

Grout: \_\_\_\_\_

Hall bath

Floor: \_\_\_\_\_

Walls: \_\_\_\_\_

Product: \_\_\_\_\_

Tile

color: \_\_\_\_\_

Grout: \_\_\_\_\_

Bath# \_\_\_\_\_  
Floor: \_\_\_\_\_

Walls: \_\_\_\_\_

Product: \_\_\_\_\_

Tile  
color: \_\_\_\_\_

Grout: \_\_\_\_\_

Powder room  
Floor: \_\_\_\_\_

Walls: \_\_\_\_\_

Product: \_\_\_\_\_

Tile: \_\_\_\_\_

Grout: \_\_\_\_\_

Base. bath  
Floor: \_\_\_\_\_

Walls: \_\_\_\_\_

Product: \_\_\_\_\_

Tile: \_\_\_\_\_

Grout: \_\_\_\_\_

Special ceramic tile:  
Floor: \_\_\_\_\_

Walls: \_\_\_\_\_

Product: \_\_\_\_\_

Tile: \_\_\_\_\_

Grout: \_\_\_\_\_

4. Bathroom mirrors:

Master bath:

Location: \_\_\_\_\_

Approximate

size: \_\_\_\_\_

Special

Instructions: \_\_\_\_\_

Hall bath:

Location: \_\_\_\_\_

Approximate

size: \_\_\_\_\_

Special

instructions: \_\_\_\_\_

Bath # \_\_\_\_\_

Location: \_\_\_\_\_

Approximate

size: \_\_\_\_\_

Special

instructions: \_\_\_\_\_

Powder room:

Location: \_\_\_\_\_

Approximate

size: \_\_\_\_\_

Special

instructions: \_\_\_\_\_

Basement bath:

Location: \_\_\_\_\_

Approximate

size: \_\_\_\_\_

Special

instructions: \_\_\_\_\_

5. Master bathroom

(a) Medicine cabinets

(1) Manufacturer and

model: \_\_\_\_\_

\_\_\_\_\_  
-

(2) Quantity: \_\_\_\_\_  
\_\_\_\_\_

(3) Rough opening in wall: \_\_\_\_\_  
\_\_\_\_\_ will install bath accessories furnished by the owner.

6. Hall bath

(a) Medicine cabinets

(1) Manufacturer and model: \_\_\_\_\_  
\_\_\_\_\_

(2) Quantity: \_\_\_\_\_  
\_\_\_\_\_

(3) Rough opening in wall: \_\_\_\_\_  
\_\_\_\_\_ will install bath accessories furnished by the owner.

7. Powder Room

(a) Medicine cabinets

(1) Manufacturer and model: \_\_\_\_\_  
\_\_\_\_\_

(2) Quantity: \_\_\_\_\_  
\_\_\_\_\_

(3) Rough opening in wall: \_\_\_\_\_  
\_\_\_\_\_ will install bath accessories furnished by the owner.

G. Interior Doors and Trim

1. Interior Doors

(a) Style: \_\_\_\_\_  
\_\_\_\_\_

(b) Sizes, swings: (per plan)

(c) Special Doors: \_\_\_\_\_

---

---

H. Trim Chart

Location Special	Base	Casing	Crown	Chair
---------------------	------	--------	-------	-------

Foyers: \_\_\_\_\_

Living  
Room: \_\_\_\_\_

Dining Room: \_\_\_\_\_

Family Room: \_\_\_\_\_

Powder Room: \_\_\_\_\_

First Room Hall: \_\_\_\_\_

Kitchen: \_\_\_\_\_

Sec. Fl. Hallway: \_\_\_\_\_

Master  
Bedroom: \_\_\_\_\_

Breakfast  
room: \_\_\_\_\_

Other  
Bedrooms: \_\_\_\_\_

Stairs: \_\_\_\_\_

Laundry  
Room: \_\_\_\_\_

(a) Special trim

(1)  
Library: \_\_\_\_\_



---

---

(2) Built-ins: \_\_\_\_\_

---

---

I. Handrail Systems

1. Location: Main

(a) General description: \_\_\_\_\_

---

—

(b) Handrail: \_\_\_\_\_

---

---

—

(c) Newel posts: \_\_\_\_\_

---

—

(d) Balusters: \_\_\_\_\_

---

---

—

(e) Finish: \_\_\_\_\_

---

---

2. Location: Basement

(a) General description: \_\_\_\_\_

---

(b)

Handrail: \_\_\_\_\_

(c) Newel  
posts: \_\_\_\_\_

(d)

Balusters: \_\_\_\_\_

(e)

Finish: \_\_\_\_\_

---

J. Fireplace facades

1.

Location: \_\_\_\_\_

(a) Opening  
size: \_\_\_\_\_

(b) Facade  
description: \_\_\_\_\_

(c) Hearth  
description: \_\_\_\_\_

2.

Location: \_\_\_\_\_

(a) Opening  
size: \_\_\_\_\_

(b) Facade  
description: \_\_\_\_\_

(c) Hearth  
description: \_\_\_\_\_

3.

Location: \_\_\_\_\_

(a) Opening

size: \_\_\_\_\_

(b) Facade

description: \_\_\_\_\_

(c) Hearth

description: \_\_\_\_\_

K. Exterior painting

1. All exterior soffits, windows, trim, siding (if applicable), and doors (except clad material) are painted with one coat primer and \_\_\_ coats of: \_\_\_\_\_

(a) Manufacturer \_\_\_\_\_

and

type: \_\_\_\_\_

\_\_\_\_\_

(b)

Color(s): \_\_\_\_\_

\_\_\_\_\_

2. Front \_\_\_\_\_ Entrance  
Way: \_\_\_\_\_

3. Treated lumber (decks) are left natural because the characteristics of the lumber.

4.

Special: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

L. Interior paint/stain

1. Standards include

(a)

Manufacturer: \_\_\_\_\_

\_\_\_\_\_

(b) Walls \_\_\_\_\_

and

ceilings: \_\_\_\_\_

---

—

---

—

---

—

(c) Painted trim and doors: \_\_\_\_\_

---

—

(d) Stained trim and doors: stain and varnish, polyurethane (satin finish): \_\_\_\_\_

---

—

---

—

(e) Kitchen work areas and bathrooms: \_\_\_\_\_

---

—

---

—

(f) Mixed Colors and custom painting will be priced out as extras.

M. Finish hardware

1. Exterior door locks and hardware

(a) Front entrance

(1) Type: handle set

(2) Handle set - Manufacturer and model: \_\_\_\_\_

---

—

(3) Slide bolts: \_\_\_\_\_

(4) Dead bolts: \_\_\_\_\_

(5) Finish: \_\_\_\_\_  
\_\_\_\_\_

(6) Pre-drilled  
bore: \_\_\_\_\_

(b) Garage Door to House

(1) Type: \_\_\_\_\_  
\_\_\_\_\_

(2) Manufacturer \_\_\_\_\_ and  
model: \_\_\_\_\_  
\_\_\_\_\_

(3) Slide  
bolts: \_\_\_\_\_

(4) Dead  
bolts: \_\_\_\_\_

(5) Finish: \_\_\_\_\_  
\_\_\_\_\_

(6) Pre-drilled  
bore: \_\_\_\_\_

(c) Location:

(1) Type  
door: \_\_\_\_\_

(2) Manufacturer \_\_\_\_\_ and  
model: \_\_\_\_\_

(3) Slide  
bolt: \_\_\_\_\_

(4) Dead  
bolt: \_\_\_\_\_

(5) Finish: \_\_\_\_\_  
\_\_\_\_\_

(6) Pre-drilled  
bore: \_\_\_\_\_

2. Interior door locks

(a) \_\_\_\_\_ Manufacturer \_\_\_\_\_ and  
model: \_\_\_\_\_  
\_\_\_\_\_

(b) Privacy Locks

(1) Bedroom  
entrances: \_\_\_\_\_

- (2) First \_\_\_\_\_ floor \_\_\_\_\_ to  
basement:\_\_\_\_\_
- (3) Powder  
room:\_\_\_\_\_
- (4) Quantity: per plans
- (c) Bathroom Locks
  - (1) All baths: brass color outside, chrome color inside
  - (2) Quantity: Per plans
- (d) Passage
  - (1) Closets and Laundry Room
- (e) Dummy Knobs (with ball catches)
  - (1) Non-locking, knobs on one side of door only
  - (2) Use on double doors, on closets and pantry doors: Brass with clear finish
- (f) Special \_\_\_\_\_ interior \_\_\_\_\_ door  
hardware:\_\_\_\_\_

---



---

- 3. Miscellaneous hardware
  - (a) Closet poles: wood
  - (b) Coat hooks: not included
  - (c) Door stops: spring type
  - (d) Misc.  
hardware:\_\_\_\_\_

---



---

- 4. Special \_\_\_\_\_ mirrors/glass  
shelves:\_\_\_\_\_

---

N. Laundry room

- 1. Cabinetry
  - (a)  
Layout:\_\_\_\_\_
  - (b)  
Description:\_\_\_\_\_

(c) Color/finish: \_\_\_\_\_  
\_\_\_\_\_

2. Cabinet top

(a) Material: \_\_\_\_\_  
\_\_\_\_\_

(b) Color: \_\_\_\_\_  
\_\_\_\_\_

3. Laundry tub

a) Manufacturer \_\_\_\_\_ and  
model: \_\_\_\_\_

b) Color: white

c) Faucet \_\_\_\_\_ hole  
spacing: \_\_\_\_\_

O. \_\_\_\_\_ Special  
projects: \_\_\_\_\_

---

---

---

# The Homeowner's Emotional Roller Coaster

